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ABSTRACT

This curriculum guide was developed to help teachers use the new and current textbook adopted by Texas in 1991-92 for teaching the two-semester Marketing Education I course. The guide is organized in three sections. The first section contains information on using the guide: overview, sample lesson plans and other worksheets, suggestions for adapting instruction for special needs students, and information on the Texas teacher appraisal system. Section 2 contains the following materials for developing a scope and sequence: a description of the text and supporting materials, correlations of specific essential elements of the curriculum to the text, assignments correlated to essential elements, resource materials, overview of a recommended scope and sequence, and worksheets for planning a scope and sequence. The third section contains instructional planning sheets based on chapters and assignments in the textbook and other sources. Planning sheets include comments on chapters, indicators of chapter content, suggested related materials, content, and assignments. Two appendixes list terms to know and their definitions, correlated to specific essential elements. (KC)

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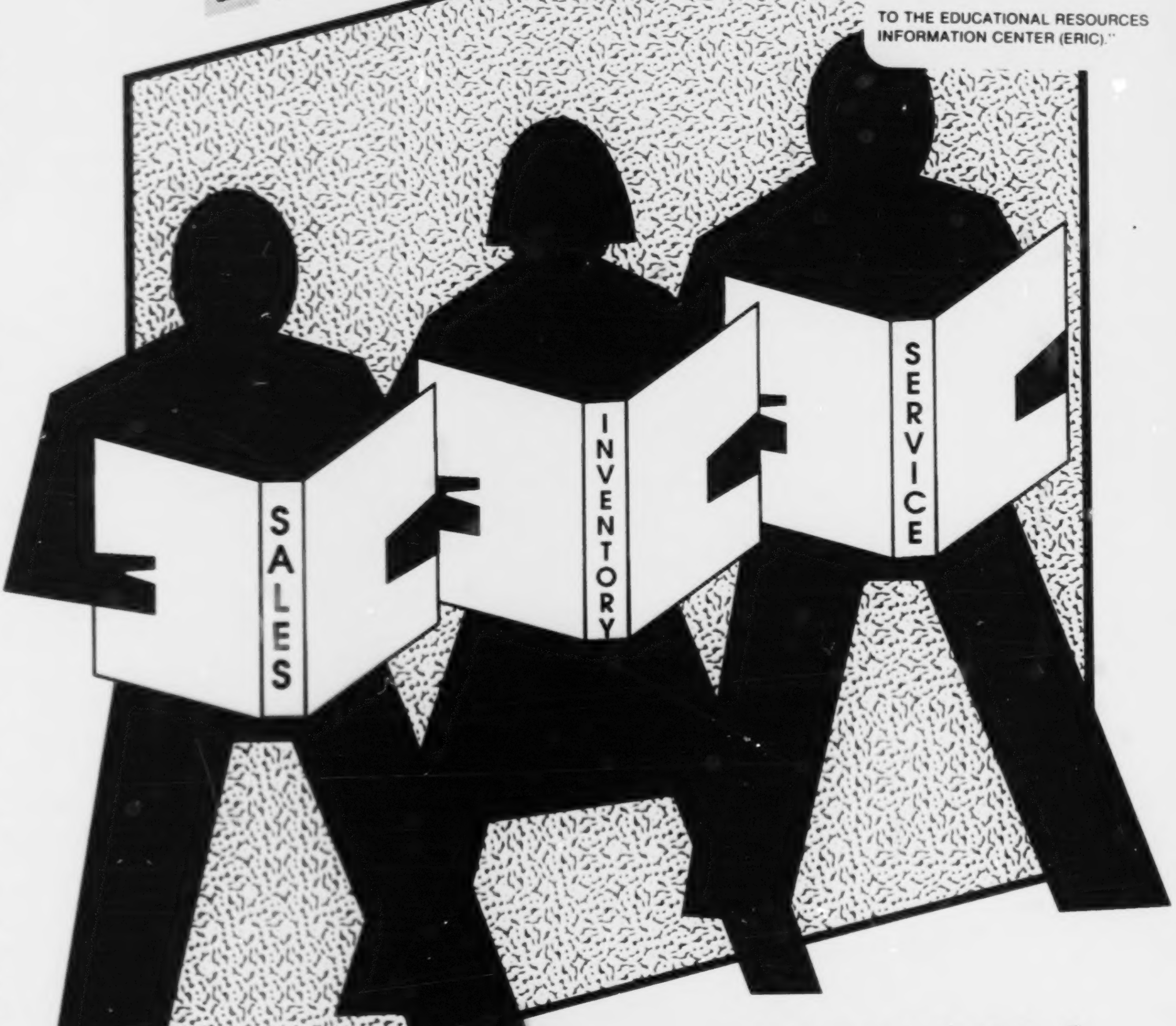

CURRICULUM GUIDE

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Curriculum Guide for Marketing Education I

A Two-Semester Course for Marketing Education

Published by

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Section One

Using This Curriculum Guide

- Overview of the Guide
- Lesson Plans and Other Worksheets
  - Lesson Plan Worksheet
  - Lesson Planning Sheet I
  - Lesson Planning Sheet II
  - Information Lesson Plan
  - Affective Development Outline
  - Lesson Plan for a Task/Procedure/Psychomotor Skill
  - Activity Related to Texas Assessment of Academic Skills
  - Essential Elements Record for Marketing Education I
- Adapting Instruction for Special Needs Students
- The Texas Teacher Appraisal System

All worksheets may be photocopied for teacher use.

Overview of the Guide

This guide will help teachers decide how best to use the new and current text adopted by Texas in 1991–92 for teaching the two-semester course titled Marketing Education I. The most useful features from the earlier curriculum guide have been included, but changes have been made in these four areas:

1. Most of the common essential elements for Marketing Education have been incorporated into Marketing Education I. The two exceptions are those on leadership and on safety, which can be addressed elsewhere. Additional content or instruction may be needed for some of the common essential elements. A new individualized manual, *Preparing to Succeed in Marketing,* has been developed to address the common elements. This guide indicates where specific content in *Preparing to Succeed in Marketing* fits essential elements.
2. With the exception of some of the common essential elements, the text addresses all the essential elements for Marketing Education I.
3. Support materials from the publisher of *Marketing Essentials* help in addressing important responsibilities of teachers—such as those for developing higher-level thinking skills and academic skills. The text and its related materials should be sufficient for presenting the course. The only other materials identified in the guide are several from EIMC–Educational Resources which teachers may already be using.
4. The *Teacher's Annotated Edition of Marketing Essentials* contains detailed information on how to teach each chapter while following current teaching strategies. It uses the objectives stated at the first of each textbook chapter as the "Lesson Focus (Objectives)" for each lesson it outlines.

Developing a Scope, Sequence, and Schedule

Section Two includes a recommended scope and sequence. Teachers may want to use it as it is, modify it, or replace it. To make all three alternatives simpler, various materials are provided.

- A description of the text and a list of all the chapters in the text are presented first. The latter identifies which essential elements are best addressed by each chapter.
- A correlation chart shows which chapters relate to specific essential elements for the course. Quite often *Marketing Essentials* has several chapters that address the same element in different ways. The same chart shows where *Preparing to Succeed in Marketing* addresses essential elements for ME-I. For some elements only *Preparing to Succeed* is cited, although there may be other sources.
- A short overview of a recommended scope and sequence identifies which elements are addressed by each chapter, and shows that almost all of them are covered if the recommended chapters are covered. The exceptions are those elements for which only citations for *Preparing to Succeed in Marketing* have been provided.
- A two-page blank form is provided with work space for the teacher to use in developing a revision of the scope and sequence.
- The recommended scope and sequence appears on several pages of worksheets that can be used as an actual schedule for instruction. On each page the left column has blank space for dates of instruction. The center column has text chapters in the recommended scope and sequence. The right column has been left blank for teacher notes and activities related to the text content for each week. Teachers will need to determine when to make assignments from *Preparing to Succeed in Marketing,* which have not been included on the form.
- A blank three-column worksheet set, for teachers who wish to develop a different scope and sequence, provides more space than the overview for additional notes.

Developing and Presenting Instruction

Other instructional decisions to be made by each teacher are assisted by materials in **Section Three,** which is arranged for the teacher who plans to present entire chapters in a selected sequence but who wants to keep track of when and how each essential element is covered.

Section Three has a set of instructional planner sheets, one for each chapter in the text. They provide a brief overview of chapter content correlated to elements and cite other useful materials. The planners should be helpful for initial planning as well as for quick reviews during the year. Individual sheets can be copied, perhaps in color, so they can then be rearranged in the order developed by the teacher and used as front sheets for lesson plans.

Individual instructional planner sheets have also been included for the assignments in *Preparing to Succeed in Marketing*. Because that manual is for individualized instruction, the assignments were not specifically included in recommendations for scope and sequence. Teachers may have widely varying opinions to as how best to use that manual, or even whether to use it for the course. However, it and other materials from EIMC–Educational Resources were specifically designed for individualized instruction.

Addressing the Cognitive, Affective, and Psychomotor Domains

Marketing educators teach information, attitudes, and physical skills. For specific essential elements, teachers need to consider objectives that address cognitive, affective, and psychomotor learning. This approach will offer opportunities for extending, because both cognitive and affective objectives often require going beyond simple knowledge to higher levels of thinking.

Actual tasks or specific jobs often require some mastery in all three domains and could be a good starting point for determining the method of instruction. Instruction in each of the three domains has special considerations.

Cognitive. Most lesson plans and lesson plan worksheets are designed for objectives related to the cognitive domain, since the mastery of information is a common objective in Marketing Education. The strategies used are well known.

Affective. Developing attitudes often requires presentation of information, plus subsequent reinforcement and final evaluation of progress. The evaluation should be based on selected criteria. Specific ME essential elements often present situations for which affective objectives should be stated and met. This development of attitudes can take place over a period of time. A worksheet titled "Affective Development Outline" is provided later in this section for teacher use.

Psychomotor. Development of physical skills is probably the least common ME objective, yet it is vital in some situations. Psychomotor skills development is commonly related to the learning of procedures and tasks. A lesson plan that can be used for such tasks is included in this section. The approach can be helpful even when a high degree of physical skill is not needed. Many procedures and tasks involve the mastery of steps and key points, this lesson plan's basic design feature. This form can also be used to correlate the procedure to other instruction, such as related information and related TAAS objectives. Although some procedures to be learned have minimal physical skill requirements, it is important to state the criteria for success. For example, a speed-plus-accuracy requirement might be one of the standards for using a cash register.

Other Instructional Responsibilities

Marketing Education teachers have a role that is broader than just teaching marketing content. They are responsible for adapting instruction for special needs students, assisting students in developing higher level thinking skills, and reinforcing basic academic skills. Teachers also have to be accountable both for their teaching skills and for results of instruction.

The **textbook and its support materials** address most of those responsibilities. The *Annotated Teacher's Edition for Marketing Essentials* has chapters on teaching critical thinking in the marketing classroom, teaching students with special needs, and teaching students with limited English proficiency. Each lesson then has subtopics grouped under such headings as Lesson

Focus, Instruction, Guided Practice, Independent Practice, Reteaching, Enrichment, and Closure. Answers and a chapter review are also included. Where appropriate, lessons have subtopics for using basic skills in math, communication, and human relations. Other support materials include a student activity workbook, a math workbook, and testmaker software.

Additional assistance with meeting the ME teacher's responsibilities can come from this guide and other materials from EIMC-Educational Resources.

For **academic skills**, worksheet blanks with checklists of the objectives of the Texas Assessment of Academic Skills (TAAS) are included near the end of this section. These easy-to-use checklists have space to describe the activity and how it fits other instruction. EIMC-Educational Resources' *Balancing the Curriculum for Marketing Education* is a student activity book designed to reinforce basic skills while teaching the ME essential elements. Although based on earlier elements, the book's activities are directly applicable to the new ME-I essential elements. A teacher's guide is available for *Balancing the Curriculum*.

Another important teacher responsibility is to foster **thinking skills** beyond those of rote memory. Today most materials stress such skills, and most materials and methods reflect Benjamin Bloom's taxonomy for organizing instruction to promote thinking at all levels (*A Taxonomy of Educational Objectives in the Cognitive Domain* [David McKay Co., 1956]). This taxonomy consists of six cognitive levels: knowledge, comprehension, application, analysis, synthesis, and evaluation. Each of these levels builds on the preceding levels. Students must be led sequentially through them, extending their thinking at each step. Foundational skills must be learned so higher level thinking can take place. Figure 1 shows the cognitive levels of Bloom's taxonomy.

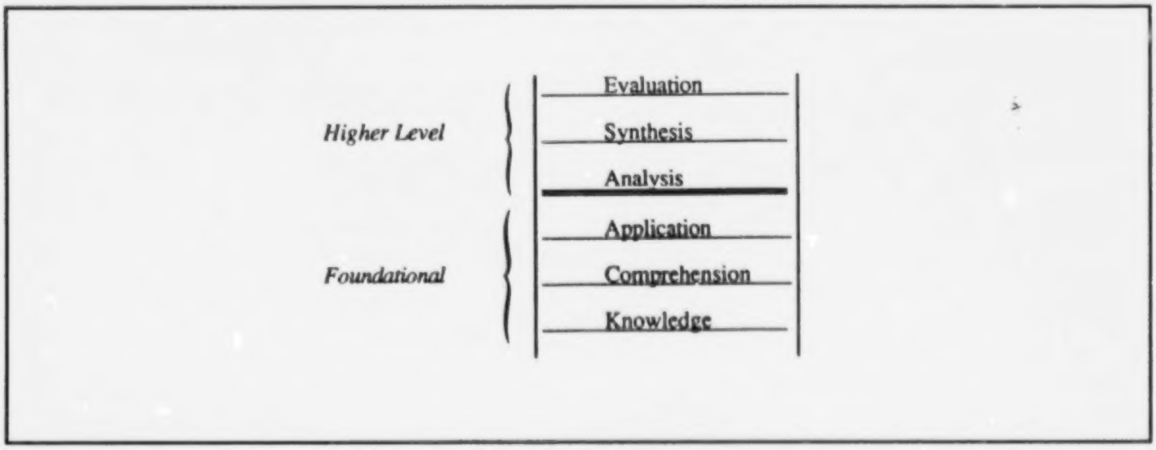


Fig. 1. Bloom's Taxonomy

Instruction for special needs students usually requires additional efforts by the teacher, which are addressed later in this section. The EIMC-Educational Resources publication *Overheads and Handouts for Marketing Education* may also be adaptable. It contains masters for single-concept instruction on specific essential elements.

The Texas Teacher Appraisal System (TTAS) and its evaluation instrument are used for evaluating **teaching skills**. TTAS is discussed later in Section One, and several of the lesson plans in this section are relevant to TTAS. Using one of them can help ensure that recommended strategies are used. The textbook as well as its support materials can assist in meeting the TTAS requirements.

Teachers are responsible for ensuring that all the **essential elements** are covered and for making certain that students master each one. The checklist entitled "Essential Elements Record," located in this section, can aid in meeting this responsibility.

Lesson Plans and Other Worksheets

There is no standard form for lesson plans, although some schools and districts may have a required form. The various forms that follow can be used however the teacher wishes and may be freely copied.

The **Lesson Plan Worksheet** combines the basic structure of traditional formats with current terminology and instructional strategies. For that reason, it should be helpful in meeting criteria of the Texas Teacher Appraisal System. It is designed to be used for one class period. This lesson plan worksheet has three main sections (see fig. 2). The first section of the worksheet provides space for listing the essential element(s), TAAS objectives, the curriculum document, and lesson outcomes/objectives. The second section provides spaces for recording which of the seven strategies will be used in the lesson: (1) focus activity, (2) explanation/check understanding, (3) guided practice exercise, (4) checking mastery, (5) independent practice, (6) extension, and/or (7) closure. For each strategy, space is provided to check what will be done and to write brief notes related to that strategy. The third section provides space for describing a sponge activity that can be used if time is available.

Lesson Planning Sheet I is a variation of the previous form. It has descriptive notations which tell how each part of the plan meets specific TTAS criteria. Teachers who use this sheet usually have it on a computer so it can be expanded by adding spaces between categories for additional content.

Lesson Planning Sheet II is correlated to the TTAS criteria, but only by codes, such as (6a-n). It also is more useful with a computer.

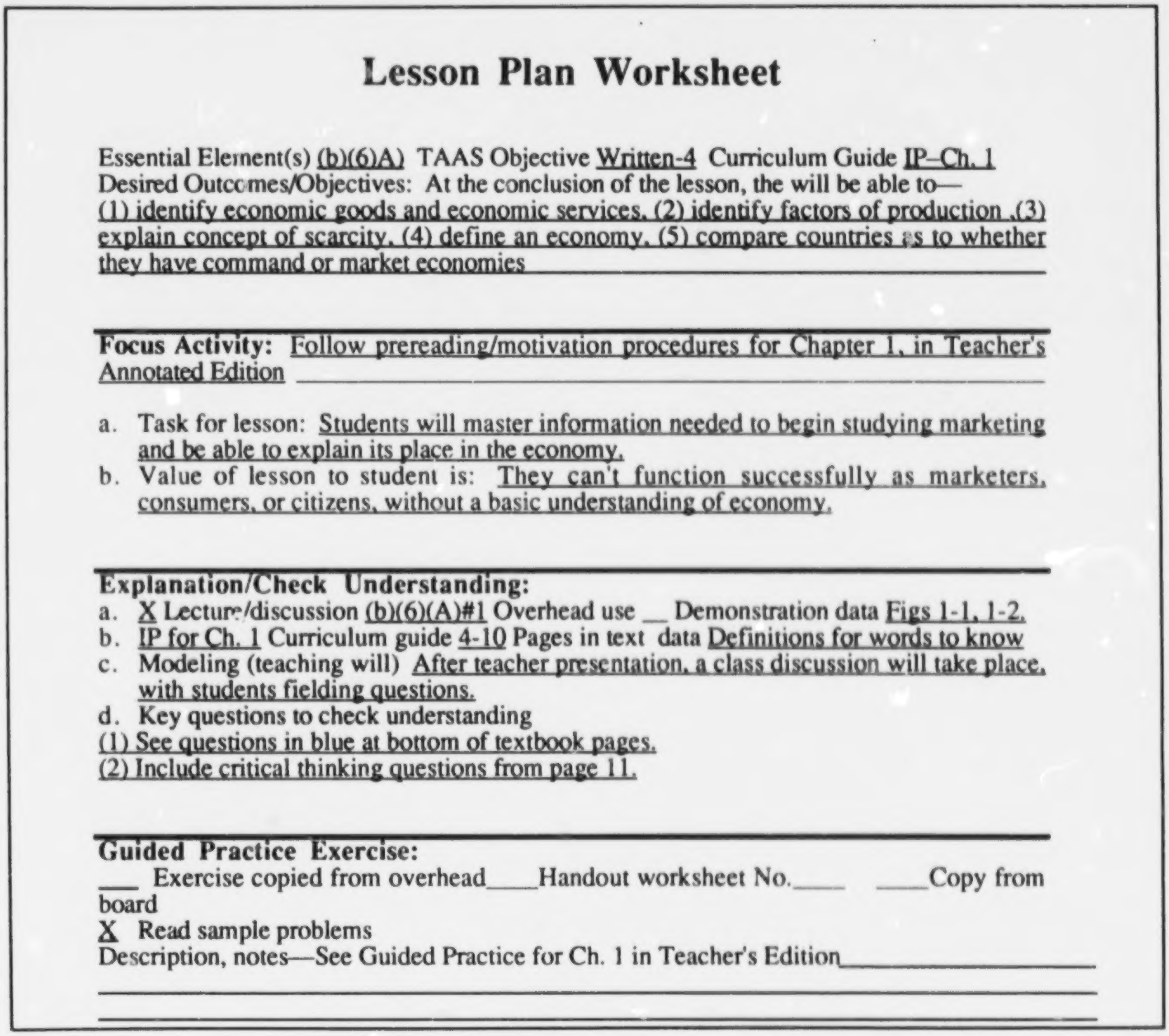
The **Information Lesson Plan** is for teachers who prefer an older form and is used if cognitive objectives are to be addressed.

The **Affective Development Outline** is designed to help teachers address attitude development, which is the basis of several of the former common essential elements that are now part of ME-I.

The **Lesson Plan for a Task/Procedure/Psychomotor Skill** is based on the familiar five-step lesson plan. Even if physical skills are not involved, it may be useful for teaching step-by-step procedures, such as selling.

The worksheet for an **Activity Related to Texas Assessment of Academic Skills** provides both a convenient reference and a basic form for describing an activity and indicating which TAAS objective it addresses. A teacher can review the information at the top of the sheet, mark the appropriate items, then describe the activity at the bottom of the sheet or elsewhere. The form can help ensure that an activity developed for a particular need can be located and used again.

The **Essential Elements Record for Marketing Education I** should make it easier to record relevant instruction for each essential element, and each student's mastery of an element. The heading is blank so the teacher can indicate the form's purpose. Space before each element can record whatever data the teacher deems important for the purpose.



Lesson Plan Worksheet

Essential Element(s) (b)(6)A) TAAS Objective Written-4 Curriculum Guide IP–Ch. 1
Desired Outcomes/Objectives: At the conclusion of the lesson, the will be able to—
(1) identify economic goods and economic services, (2) identify factors of production ,(3) explain concept of scarcity, (4) define an economy, (5) compare countries as to whether they have command or market economies

Focus Activity: Follow prereading/motivation procedures for Chapter 1, in Teacher's Annotated Edition

a. Task for lesson: Students will master information needed to begin studying marketing and be able to explain its place in the economy.
b. Value of lesson to student is: They can't function successfully as marketers, consumers, or citizens, without a basic understanding of economy.

Explanation/Check Understanding:
a. X Lecture/discussion (b)(6)(A)#1 Overhead use __ Demonstration data Figs 1-1, 1-2.
b. IP for Ch. 1 Curriculum guide 4-10 Pages in text data Definitions for words to know
c. Modeling (teaching will) After teacher presentation, a class discussion will take place, with students fielding questions.
d. Key questions to check understanding
(1) See questions in blue at bottom of textbook pages.
(2) Include critical thinking questions from page 11.

Guided Practice Exercise:
___ Exercise copied from overhead___Handout worksheet No.____ ____Copy from board
X Read sample problems
Description, notes—See Guided Practice for Ch. 1 in Teacher's Edition

Fig. 2. Page 1 of a sample completed Lesson Plan Worksheet

Checking Mastery: (Learning Progress)
X View each student's work ______ Have students check and signal correct
Notes: Publisher has test for chapter

Independent Practice: (reteach those needing help while others work)
___Worksheet no._ Copy from overhead no.___ Copy from board X X Copy as dictated
___Reteach worksheet/outline no._

Use independent practice from teacher's edition; have students write answers. Alternatively this could be developed as a handout

Extension: (Enrichment/Application)
___Worksheet no._ X Other

Describe how this activity makes relevant application of the lesson Have students do #3 from "Using Basic Skills" and/or #1 from "Application Projects"

Closure: (Restate the learning)

Method used to involve learner in the summary: Use vocabulary review and fact and idea review from Teacher's Annotated Edition

Sponge Activities: Sponge focus activity no.____ Other sponge activity no.____
Consider using OH/HO (b)(6)A)#1 as a handout rather than as an overhead, with students doing activity at the bottom.

Materials Required:

Textbooks for students; teacher's annotated edition; OH/HO (b)(6)(A)#1

Fig. 2. Page 2 of a sample completed Lesson Plan Worksheet

Lesson Plan Worksheet

Essential Element(s)______________ TAAS Objective ___________ Curriculum Guide______

Desired Outcomes/Objectives: At the conclusion of the lesson, the student will be able to—

____

____

Focus Activity: ____

____

____

a. Task for lesson: ____

____

b. Value of lesson to student is: _______________________________

____

Explanation/Check Understanding:

a. ___Lecture/discussion ___Overhead use ___Demonstration data__________________

b. ___Curriculum guide ___Pages in text data__________________________

c. ___Modeling (teaching will)____________________________________

____

____

____

d. ___Key questions to check understanding:

1. ____
2. ____
3. ____
4. ____
5. ____

Guided Practice Exercise:

___Copy exercise from overhead ___Hand out worksheet no. ___ ___Copy from board

___Read sample problems

Description, notes____

____

Checking Mastery: (Learning Progress)

___View each student's work ___Have students check and signal correct

Notes:______________________________

____

Independent Practice: (reteach those needing help while others work)

___Worksheet no.___ __Copy from overhead no._____ ___Copy from board ___Copy as dictated

___Reteach worksheet/outline no. _____

____

____

Extension: (Enrichment/Application)

___Worksheet no.___ ___Other______________________________

Describe how this activity makes relevant application of the lesson______________________________

____

Closure: (Restate the learning)______________________________

____

____

Method used to involve learner in the summary:______________________________

____

Sponge Activities: Sponge focus activity no._____ Other sponge activity no.___

Materials Required:

Lesson Planning Sheet I

SUBJECT:
UNIT:

EE #:
TAAS:
Objective #:

TEACHING, DESIRED OUTCOMES/OBJECTIVES:
The student will be able to:

LEARNING EXPERIENCES:
The student will have the opportunity to:

ANTICIPATORY SET/FOCUS: (2a-communicates learning expectations, 3a-secures students' attention, 4a/6a-begins inst promptly/with appropriate introduction, 6c-relates content to prior/future learning, 8a-relates content to student interest/experience, 9d-establishes rapport)

_____ Focus Attention
_____ Provide Practice
_____ Diagnostic

EXPLANATION/MODELING: (1b-interacts w/students, 2d/8c-reinforces, 6a-begins w/appropriate activity, 6b-appropriate sequence, 6d-definition concepts/description of skills, 6e-elaboration/critical attributes, 6f-stresses generalization/principle/rule, 7b-explains clearly, 7c-stresses important points/dimensions of concept, 7d,e-uses correct grammar/language, 8b, d-emphasizes importance/challenges)

CHECKING FOR UNDERSTANDING: (1c-solicits student participation, 2b-monitors students' performances, 2c-solicits response/demo for assessment, 2d reinforces correct responses, 7e-clarifies student misunderstanding, 9a-avoids sarcasm)

GUIDED PRACTICE: (2c-solicits response/demonstration from specific students for assessment, 3c-clear adminstrative directions, 1f/4b-implements appropriate sequence of activities, 4d-maintains forcus, 9b,d-maintains courtesy/supportive environment)

INDEPENDENT PRACTICE: (2b-monitors students' performance, 4b-implements appropriate sequence of activities, 4e-keeps students engaged, 6q-provides for application, 7e-clarifies student misunderstanding)

CORRECTIVES AND/OR EXTENSIONS: (2e-corrective feedback, 2f-reteaches, 4e-keeps students engaged, 9c-encourages slow/reluctant learners)

CLOSURE: (6h-closes instruction appropriately, 6c-relates content to prior/future learning, 9b-emphasizes value/importance of the activity or content)

MATERIALS USED: (1a-varies activities, 3b-uses procedures/routines, 3d-appropriate seating, 3e-has materials, aids, facilities ready, 4e-keeps students engaged)

MATERIALS NEEDED:

Lesson Planning Sheet II

SUBJECT:
UNIT:

EE #:
TAAS
Objective #:

OUTCOMES/OBJECTIVES:
(6a-h)
The student will be able to:

PURPOSE:

FOCUS:
(2a, 3a, 4a, 6a, 6c, 8a, 9d)

_______Focus Attention
_______Provide Practice
_______Diagnostic

INDEPENDENT PRACTICE:
(2b, 4b, 4e, 6g, 7e) (Mastery = %)

SUPERVISED PRACTICE:
(2c, 3c, 1f/4b, 4d, 9b,d) (Mastery = %)

EXPLANATION:
(1b, 2d/8c, 6a, 6b, 6d, 6e, 6f, 7b, 7c, 7d, 8b,d)

MODELING:

MONITORING:
(Knowledge/Comprehension) (1c, 2b, 2c, 2d, 7e, 9a)

CORRECTIVES AND/OR EXTENSIONS:
(2e, 2f, 4e, 9c)

CLOSURE:
(6h, 6c, 9b)

MATERIALS USED:
(1a, 3b, 3d, 3e, 4e)

MATERIALS NEEDED:

Information Lesson Plan (Current Terminology)

(Used to meet cognitive objectives)

Essential Element

Subelement

Unit

Topic

Outcomes/Objectives

Related TAAS Objectives

Introduction (Focus—do activity; state task for lesson and value of lesson)

Method (Explanation/check understanding, guided practice exercise, others)

Learning Activity (Various strategies, activities)

Resources (Resources include lesson planner #, text, others)

Evaluation (Checking mastery)

Summary (Closure)

Affective Development Outline

Essential Element ____

Subelement ____

Directions: This form provides a way to plan instruction for one essential element/subelement that involves the affective domain. For example, (2)(G) in (a) "common elements" is "Recognize the dignity in work." Attitudes like that are often developed over a period of time by (1) presenting information, (2) reinforcing its importance later, (3) providing students situations and time to practice and develop, and (4) using selected criteria to judge whether a change in attitude has taken place.

(1) Title and location of lesson plan(s) that will include information related to this element and subelement

____

____

____

____

____

(2) Anticipated opportunities for reinforcing importance of this element and subelement

____

____

____

____

____

(3) Ways in which students can practice or perform element/subelement

____

____

____

____

____

____

(4) Criteria for deciding and observing when student has mastered element/subelement

____

____

____

____

____

____

____

Lesson Plan for a Task/Procedure/Psychomotor Skill

Element ____________________

Subelement ____________________

Related information lesson ____________________

Related TAAS objective ____________________

Procedure or task name ____________________

Purpose of procedure or task ____________________

Criteria (standards) for success ____________________

____

Materials ____________________

Teaching aids ____________________

References ____________________ ____________________

____

I. Preparation (Focus—state purpose of procedure, its value, and how learning is to take place)

____

____

____

____

II. Presentation (Explanation/check understanding, modeling, demonstration, others)

Steps in the task or procedure	*Key points about each step that can make a difference between success and failure*

Steps in the task or procedure	*Key points about each step that can make a difference between success and failure*

III. Application, practice by students under close supervision
(Guided practice exercise, independent practice)

IV. Test performance of procedure or task to acceptable standards (Checking mastery)

V. Summary of what was learned and its significance (Closure)

Activity Related to Texas Assessment of Academic Skills

for ____

English Language Arts

Reading Comprehension
______ 1. determine the meaning of words
______ 2. identify supporting ideas
______ 3. summarize written notes
______ 4. perceive relationships and recognize outcomes
______ 5. analyze information to make inferences/generalizations
______ 6. recognize points of view, propaganda, and/or fact and nonfact

Written Communication
______ 1. respond appropriately to the purpose/audience in a written composition
______ 2. organize ideas in a written composition
______ 3. demonstrate control of the English language in a written composition
______ 4. generate a written composition which develops and supports a central idea
______ 5. recognize appropriate sentence construction
______ 6. recognize appropriate word usage
______ 7. recognize within the context of a written passage (a) the correct spelling of words, (b) correct capitalization, (c) appropriate punctuation

Mathematics

Domain: Concepts
Demonstrate an understanding of:
______ 1. the concepts of numbers
______ 2. mathematical relations, functions, and other algebraic concepts
______ 3. geometric properties and relationships
______ 4. measurement concepts using metric and customary units
______ 5. probability and statistics

Domain: Operations
Demonstrate skills, concepts, applications for:
______ 1. addition
______ 2. subtraction
______ 3. multiplication
______ 4. division

Domain: Problem Solving
______ 1. estimate solutions
______ 2. analyze problems and identify solution strategies
______ 3. express problems using mathematics representations
______ 4. evaluate the reasonableness of problem solutions

Essential Elements Record for Marketing Education I

Space is provided before each item for information on instruction and/or mastery.

(1) Basic marketing principles

____________ (A) understand the role of marketing in American business;
____________ (B) understand the basic vocabulary of marketing; and
____________ (C) define marketing as it impacts on consumers.

(2) Basic marketing functions

____________ (A) describe the application and use of economic resources in marketing;
____________ (B) understand how marketing impacts our standard of living; and
____________ (C) learn how marketing is organized by its functions.

(3) Business policies, forms, and records

____________ (A) interpret and carry out business policies;
____________ (B) follow employer's safety rules and regulations; and
____________ (C) complete required business forms and records.

(4) Business environment, law, and ethics

____________ (A) understand how laws, policies, and regulations are applied to business organizations; and
____________ (B) identify external and internal security procedures.

(5) Marketing management

____________ (A) identify the role and functions of management;
____________ (B) understand lines of authority; and
____________ (C) identify effective supervisory techniques.

(6) The free enterprise systems and its benefits

____________ (A) analyze the risk and profit motive factor;
____________ (B) explain the concept of supply and demand;
____________ (C) understand types of business ownership; and
____________ (D) identify the role of the entrepreneur in a free enterprise system.

(7) Computer literacy and applications

____________ (A) develop computer literacy applicable to marketing occupations; and
____________ (B) develop an awareness of specific applications of computers in marketing.

(8) Inventory control systems

____________ (A) understand various inventory systems; and
____________ (B) check incoming stock and complete stock control records.

(9) Merchandising, selling and service

____________ (A) identify the personality traits needed by an effective salesperson;
____________ (B) demonstrate the ability to assist a customer in making a good buying decision;
____________ (C) demonstrate the ability to merchandise products and services properly; and
____________ (D) understand the use of promotion for preselling.

(10) The distribution process and systems

____________ (A) identify channels of distribution and use appropriate terminology; and
____________ (B) select appropriate channels for products and services.

(11) Marketing mathematics

____________ (A) understand and apply markup, markdown, and stockturn;
____________ (B) demonstrate ability to calculate profit, loss, payroll, invoices, taxes, interest, sales slips, credit card purchases, and purchase orders; and
____________ (C) demonstrate proficiency in cashiering and cash register operations.

(12) Successful employment and/or postsecondary training

____________ (A) identify employment opportunities and preparation requirements in chosen fields;
____________ (B) identify effective methods to secure and terminate employment;
____________ (C) demonstrate effective communication skills (both oral and written) and follow through on assigned tasks;
____________ (D) demonstrate dependability and punctuality;
____________ (E) demonstrate productive work habits and attitudes;
____________ (F) understand the importance of taking pride in the quality of work performed;
____________ (G) recognize the dignity in work;
____________ (H) develop skills in planning and organizing work;
____________ (I) apply required methods and sequences when performing tasks;
____________ (J) apply principles of time management and work simplification when performing assigned tasks;
____________ (K) identify ethical practices and responsibilities; and
____________ (L) understand the importance of the application of organizational policies and procedures.

(13) Human relations and personality development

____________ (A) understand the importance of maintaining good health and proper appearance for effective job performance;
____________ (B) understand oneself and others;
____________ (C) exercise self-control;
____________ (D) accept and use criticism;
____________ (E) recognize basic human relationships as they relate to business success; and
____________ (F) demonstrate characteristics for successful working relationships.

(14) Personal and business management

____________ (A) explain how management assists in reaching personal and family goals;
____________ (B) explain the management process;
____________ (C) describe the role of management in controlling stress;
____________ (D) identify and understand personal checking accounts;
____________ (E) identify and understand different loan application processes;
____________ (F) identify and understand different financial institutions;
____________ (G) identify the role and functions of business management;
____________ (H) understand the lines of authority; and
____________ (I) identify effective supervisory techniques;

(15) Business communication

____________ (A) demonstrate proficiency in oral and written business communication;
____________ (B) identify forms of business communication;
____________ (C) demonstrate proficiency in using listening skills; and
____________ (D) recognize the dynamics of nonverbal communications.

(16) Specific occupational objectives of the students

ME-I may also address these common elements:

(1) Leadership concepts and skills. The student shall be provided opportunities to:

____________ (A) demonstrate skills, characteristics, and responsibilities of leaders and effective group memebers;
____________ (B) demonstrate a knowledge of parliamentary procedure principles;
____________ (C) plan and conduct leadership activities; and
____________ (D) prepare for effective citizenship and for participation in our democratic society.

(4) Safety and safe working conditions. The student shall be provided opportunities to:

____________ (A) identify and apply safe working practices to all training situations

Adapting Instruction for Special Needs Students

The primary purpose of this unit is to provide the vocational teacher with strategies and techniques that will be useful when teaching students with special needs. It is important to remember that the methods and approaches used with non-special needs students may not be very effective with students who have special needs. Therefore, **individualizing** instruction is vitally important in the successful instruction of special learners.

LEARNING STYLES

Each special learner has unique needs, and these needs affect how the student can best learn. For example, if a student is blind or has difficulty with "visual" learning, the instructor should stress the learner's senses of hearing and touch. If the student is deaf, the instructor should involve the learner's sense of sight. Therefore, the manner in which a student with special needs learns ceases to be a preference and becomes instead a **necessity**. Further, one of the main philosophies behind individual learning styles is that learning should be a pleasant and successful experience. Teachers, therefore, should adjust their style of teaching to allow students the benefit of learning in their preferred manner.

The following are methods a teacher can use to identify a student's learning style:

1. **Informal observation.** A simple and possibly the best way to identify a student's learning style is through informal observation. By observing the student as he or she negotiates classroom/laboratory learning activities, the teacher can collect valuable information about the student's learning style. For example, the teacher may observe that a disadvantaged student answers questions in class and does well with hands-on activities but repeatedly fails written exams. If the primary intent of the instruction is to teach vocational skills rather than reading and writing skills, the teacher could modify his or her teaching style by allowing the student to take oral and/or hands-on exams.
2. **Teacher consultation.** Consulting other teachers (e.g., special education teachers, resource room teachers, support personnel, paraprofessionals, and other vocational education teachers) can be an excellent source of information about a student's learning style.
3. **Student/parent interviews.** Interviewing the student and student's parents/guardians can result in valuable insights as to the student's best learning modes.
4. **Standardized inventories.** Standardized inventories provide an alternative for students who are shy or uncomfortable during a personal interview. Valuable information can be gained from inventories of a student's interests, personality, and learning style.

INSTRUCTIONAL STRATEGIES

Once the student's vocational goals, learning capability, and preferred learning style have been identified, the teacher can begin to experiment with a **variety** of techniques and materials. When determining which ones are best suited to the student's needs, it is important that the teacher be patient, open-minded, and flexible. Not every instructional technique and/or material can be used

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Note: Adapted from the *Vocational Special Needs Teacher Training Curriculum*, developed at Texas A&M University and available from the Extension Instruction and Materials Center, The University of Texas at Austin. See that publication for additional information.

successfully with each learner. In addition, the teacher should not hesitate to enlist the support of other instructors, school counselors, student aides, paraprofessionals, community volunteers, itinerant teachers, and/or interpreters. Pooling efforts increases the variety of approaches and the level of personal attention, and this improves the student's chances of learning.

GENERAL GUIDELINES AND INSTRUCTIONAL STRATEGIES

The following are general guidelines and instructional techniques which a teacher can use to help meet a special needs learner's unique needs and learning style:

1. **Orientation.** Students with special needs may need additional orientation with regard to: (a) the relevancy of their individualized goals, (b) class procedures, (c) safety, etc.
2. **Flexible pacing.** Students with special needs exhibit different rates of learning. The teacher should be flexible in pacing instruction and assignments to meet the learners' needs. In general, students with special needs should be paced individually to maintain their progress and interest and avoid the frustrations and failure undue pressure may cause.
3. **Demonstration.** The demonstration method can be very effective in introducing a new skill to a learner with special needs.
4. **Breaking material into small, distinct steps.** As a general rule, it is important for the teacher to break a learning concept into small, distinct steps. In this way, he or she can best identify where the student's difficulty lies.
5. **Positive environment and feedback.** In general, students with special needs lack confidence and a positive self-concept. The few successes special learners do enjoy usually result in little, if any, positive reinforcement (e.g., praise, reward, and/or encouragement). Therefore, it is incumbent upon teachers to create a positive, nonthreatening learning environment for their students and to make generous use of positive feedback when the student experiences success. Constructive criticism **should not** be avoided; however, it should be given in a positive manner (e.g., students should understand that their behavior or product is what is being criticized and **not** their worth as a human being). All students must learn that mistakes and constructive criticism are a normal and expected part of life.
6. **Use of peer tutors, college students, and volunteers.** Use of peer tutors, college students, and volunteers can greatly assist a vocational teacher's work with special learners by (a) helping with individualized instruction, (b) providing positive role models, (c) increasing student participation, (d) increasing the special learner's successful experiences, (e) increasing the student's confidence and self-esteem, and (f) improving the special learner's social and academic skills. In return, such assistants gain teaching experience and the satisfaction of seeing the students improve.
7. **Flexible grouping.** The teacher can integrate special needs learners into groups of various sizes (according to the student's goals, interests, or ability level), using assistants to help. Grouping students has the following advantages: (a) it allows the teacher more time to work among the students, (b) it allows the teacher to individualize instruction, (c) it provides special needs learners with an opportunity to work with peers and establish positive relationships with them, (d) it helps motivate special needs learners because the individualized nature of the group work is not threatening or frustrating but allows them to work at their own pace using their strongest learning style, (e) it allows teachers to arrange for instruction for the entire class, small group discussions, project groups, and small remedial sessions so that instruction will be diversified and more meaningful for all students; and (f) it allows the teacher to modify the task or assignment for a small group of students with specific needs, as in the case of learners who have a physical disability.
8. **Providing field trips and job site visits.** Scheduled field trips and job site visits can give all learners a firsthand look into the real world of work. By "shadowing" workers in a particular occupation, students can gain insight into their own career decisions. In

addition, a field trip or job site visit can be very motivational in that the student can readily observe how his/her vocational training will be used in the world of work.

9. **Use of media.** Utilizing media can embellish instruction by (a) assisting the teacher in presenting the proficiency or skill requirements for a specific job, (b) reinforcing concepts presented in a classroom, laboratory, or demonstration activity, (c) providing a way for special needs learners to show what they have learned, (d) providing a valuable source of remedial assistance, (e) providing simulated learning experiences, (g) allowing special needs students to learn through their strongest style, and (h) adding variety to the instructional program. Examples of media include computer-assisted instruction (CAI), 16mm films, filmstrips, flip charts, overhead transparencies, tape recorders, records, posters, magazines, and diagrams.
10. **Use of student-teacher contracts.** Student-teacher contracts can be excellent tools in helping learners with special needs achieve their vocational goals. Use the following guidelines to develop and implement a student-teacher contract: (a) decide on the task or project, (b) specifically state the requirements, (c) determine the minimum acceptable level of accuracy, (d) set a time limit—initially, short assignments and short time periods are usually best, (e) identify consequences, (f) discuss the contract with student and support personnel, (g) have all parties sign the contract, (h) give positive reinforcement if the terms of the contract are satisfactorily met, (i) analyze uncompleted contracts with the student to determine the causes, and (j) develop new contracts cooperatively.

SPECIFIC GUIDELINES AND INSTRUCTIONAL STRATEGIES

The following are lists of specific strategies that teachers can use to address the unique needs of special students. It is very important to note that many of these strategies should be used with all students.

Instructing Students Who Are Mentally Impaired

- Involve as many different senses as possible in the learning process.
- Use concrete, specific terms instead of abstract terms. If necessary, have the student repeat the necessary information to you.
- When giving written directions, use lists instead of paragraphs. To help the student who can barely read, contact the remedial reading staff and arrange instruction. This instruction should focus on required reading for your course and that which is vital for employment.
- Teach by demonstration whenever possible. Don't hesitate to use hand-over-hand assistance when demonstrating how to use a tool or machine.
- Allow time to practice machine and tool processes.
- Break down complex operations into smaller tasks.
- Provide feedback, letting the learner know what is wanted, and whether or not he or she is achieving it. Give lots of positive reinforcement and encouragement. Nonverbal feedback is also helpful (e.g., touching the student or task, pointing, blocking or stopping an error as it is developing, and guiding the learner's movements). In addition, provide specific feedback on the student's work. For example, say, "This piece was cut exactly to the right size," or "You put these two parts together correctly," or "Try another way."
- Build the student's confidence by (a) using activities that will assure success, (b) assigning special tasks that communicate your confidence in the student, (c) giving the student an opportunity to correct his or her work before handing it in, and (d) displaying the student's good work.
- When teaching students how to make correct discriminations, use the "match to sample" technique in which the student is provided an example and a number of choices. The student's choice is based upon the characteristics of the sample.
- When helping the student to make correct discriminations when there are **minimal** differences between the stimuli, it may be necessary to (a) present the choices in an easy

form at first, (b) exaggerate attributes, (c) make the choices gradually harder, or (d) add and then fade out color cue, add and then gradually remove large cue differences, or combine these two approaches.

- You can improve a student's powers of retention and memory by (a) being systematic and presenting one new piece of learning at a time, (b) relating new material to familiar material and keeping it practical and concrete, and (c) using training techniques such as the total task method, chaining, modeling/demonstrating, and the structured overview.
- "Generalizing," or having the student apply what has been learned to the context, can be improved by (a) using examples from different relevant contexts and (b) practicing in settings similar to or exactly like those that will be encountered on the job.

Instructing Students Who Are Hearing-Impaired

- In private, discuss with the student his/her ability to communicate with you (consider lip/speech reading, use of a hearing aid, writing and signing ability, and total communication). An open discussion with the student that demonstrates your concern is an excellent beginning and builds rapport.
- Body language communicates messages, too. Remember not to give mixed messages with your body language. Also, be alert to the body message the student is giving you (e.g., is he/she communicating tension, nervousness, avoidance, or confusion?).
- If you will be working with an interpreter, do not treat the deaf student as if he/she were a third party. Speak directly to the student. Also, remember that the interpreter is ethically bound to interpret everything you say. Therefore, sensitive issues concerning the student are best addressed in a meeting before or after class. If you are using media where the room must be darkened, focus a small lamp on the interpreter.
- Maintain good eye contact with the student while speaking.
- Speak slowly and clearly, pronouncing each word, but without exaggerating or over-pronouncing.
- Do not stand in front of a window while speaking. The light should be shining on your face and not the student's.
- Try to rephrase a thought rather than saying the same words over again.
- Encourage the student to read ahead on class material.
- Try to keep the noise level down as much as possible in the class/laboratory.
- Use handouts, the chalkboard, and other media.
- Install a light to indicate when dangerous machinery is on.

Instructing Students Who Are Speech-Impaired

- Always maintain eye contact and nod your head while the student is talking. This will help the student build confidence.
- Work cooperatively with the speech therapist or communication specialist to determine which technique will help these students to communicate most effectively.
- Encourage peer tutoring and small group activities to help the speech-impaired student develop interpersonal relationships.
- Always allow sufficient time for the student to complete his/her sentence.
- Try not to act uncomfortable when these students are communicating with you (e.g., by discontinuing eye contact, shifting your position, or clearing your throat). Your discomfort can be very discouraging.
- Do not require these students to present oral reports until they feel comfortable in the classroom.
- Use correct sentence structure for the speech-impaired student so he/she can follow your example.
- Develop a list of technical terms used in your class, and share these terms with the speech specialist to help the students become more confident in their pronunciation.

Instructing Students Who are Visually Impaired

- Orient the student to the classroom or laboratory before the course begins. Consistency and orderliness in the physical environment are very important to the visually impaired student.
- Seat the blind student so that he/she will be able to hear the instruction; provide the best distance and lighting conditions for the partially sighted student.
- Provide as many opportunities as possible for the visually impaired student to observe closely or to touch the materials.
- Give materials and handouts to the student ahead of time. A student peer can help by making a carbon copy or a photocopy of the notes. When possible, the teacher can make a copy of the teaching notes. In this way the visually impaired student can review the materials with a tutor, have them transcribed into braille, or have them taped.
- It is important to gain and hold the student's attention. Approval and disapproval must be verbalized.
- Remember that there is no need to talk louder than usual to a visually impaired student.
- Rehabilitation counselors or special needs teachers can be useful resources in helping the student use commercial or modified learning aids and tools.
- Tests may need to be prepared in large print or braille or on cassette tapes, or converted into exercises that call on the sense of touch. Also, it may be necessary to allow the student extra time to complete the test.
- Audiotaping is the most frequently used technique for taking notes or preparing modified learning materials for the visually impaired student.
- Some specially designed machines are now available for the visually impaired student: (a) OPTACON (Optical to Tactile Converter) allows students to read printed material; (b) STEREO-TONER is similar to the OPTACON but converts the printed word into a tone pattern; (c) OPTOPHONE and VISOTACTOR convert print into sound; and (d) the KURZWEIL READING MACHINE converts standard English text on a computer into easily comprehended speech.
- General tools and aids to assist the student in reading or writing lessons for vocational courses include (a) braille, (b) large print, (c) tape recorders, (d) talking books, (e) raised letters, (f) slate and stylus (for taking notes), (g) braille writers (a six-key manually operated machine), (h) typewriters, (i) braille verifiers (type braille and regular copy simultaneously), and (j) signature guides.
- Aids for mathematics and computer programming courses include (a) abacus designed for the blind, (b) raised clock faces, (c) wire geometrical forms, (d) braille rulers, (e) raised-line checkbooks, (f) raised-line boards, (g) braille dominoes, (h) braille flashcards, (i) cubes with raised braille dots for simple mathematical problems, (j) raised-line paper and graphs, (k) computer terminals that use braille printers, or those that type braille and conventional type simultaneously, and (l) talking calculators.
- Aids used frequently in other vocational courses include (a) braille maps, charts, and diagrams, (b) self-threading needles, (c) wooden or cardboard models of specimens that other students see through microscopes, (d) braille micrometers and other shop tools that have raised markings, (e) braille demonstration tapes to mark lab equipment and models, (f) light probes with audible sounds that check the operating status of machines, and (g) guides or templates to help students align objects properly.

Instructing Students Who Are Seriously Emotionally Disturbed

- Consult with the student's parents, special education teacher, or counselor to determine whether any particular teaching techniques will help or hinder learning.
- Try to understand the student. Disturbing behaviors are the outward sign of inner turmoil.
- Go easy on bad days, and avoid direct confrontations that would aggravate the situation.

- Communicate acceptance to the student and a willingness to help him or her succeed in class.
- Provide immediate feedback and reinforcement.
- Establishing rapport and trust with the student is important.
- At the beginning of the semester, help the student gain confidence by giving him or her lessons in which success can be achieved in a series of small steps.
- A measure of privacy when the student attempts a new task can ease his or her embarrassment at any awkwardness or ineptness.
- To ease pressure, allow the student to correct his/her mistakes before turning in an assignment or project.
- Help the student not to overreact to failure, and praise him or her for continuing to try.
- Cue appropriate behavior in a quiet, unemotional manner.
- In resolving discipline problems: (a) do so in privacy, (b) focus on objective facts in a calm, supportive tone, (c) actively listen to the student, (d) after listening, reflect on what has been said by telling the student what you've heard, (e) ask the student if he or she has any ideas about solving the problem (encourage the student to be specific), and (f) conclude with a clear understanding of the changes, time-frame, and benefits that are expected.
- In handling aggressive behavior: (a) try to remain calm, and model the controlled behavior which you desire, (b) intervene by either separating the individuals involved and having them work on another activity or having them take a time-out in separate corners of the room, (c) if necessary, send an uninvolved student to the office to get someone to help, either by talking to the students or by managing the class while you deal with the problem, and (d) return to normal classroom procedure as quickly as possible.
- Call on professional colleagues in special education evaluation, counseling, or therapy when the student's behavior needs additional attention.

Instructing Students Who Are Orthopedically Impaired

- In general, students with physical handicaps will be intellectually capable and able to participate in vocational programs.
- Make the necessary modifications in classrooms, laboratories, equipment, building accessibility, and lavatories.
- For taking notes the student can (a) use a tape recorder, (b) have a classmate slip carbon paper into his/her notebook to duplicate notes, and/or (c) have the instructor prepare an outline of the lecture.
- For exams the instructor can (a) give oral exams, (b) have the student dictate answers into a tape recorder or to another student, or (c) use a typewriter/computer if the student is able to type/keystroke.
- Give the student extra time to complete homework assignments. Giving the student advance notice of assignments is also helpful.
- In the laboratory, pair the student with one or more capable classmates.
- Enlarged copies of frequently used charts and diagrams posted near the student's desk eliminate the necessity of paging through a book.

Instructing Students Who Are Other Health-Impaired

- Allow the student sufficient time for rest.
- Seat the student where he/she has the easiest access to necessary facilities (hall, lavatory, chalkboard, laboratory work stations).
- Allow the student to work at his or her own pace.
- Tape lectures so the student can listen at home.
- Work cooperatively with the health team in order to learn more about the student's special needs.

- Have community resource personnel (e.g., social workers and itinerant teachers homebound students) deliver materials, assignments, and handouts to homebound students.

Instructing Students Who Have Specific Learning Disabilities

- Use visual aids and demonstrations as often as possible.
- Use concrete examples whenever possible.
- Provide the student with an outline of what will be covered in class.
- Make sure all printed materials are clear and readable.
- Allow the student to tape-record assignments if he/she has a visual perception problem.
- Allow students to take tests orally or in a mode that compliments their performance.
- Present new information in small amounts.
- Make sure that writing assignments are relevant to the content of the program.
- Allow students extra time to complete assignments, if necessary.
- List assignments in steps.
- Use task analysis to lower the frustration level of these learners.
- Use programmed instruction materials when they will be effective.

Instructing Students with Limited English Proficiency (LEP)

- Recognize the student's cultural background, and allow for individual differences.
- Encourage these students to bring dictionaries to class.
- Use demonstrations and hands-on experience as much as possible.
- Speak slowly and use simple vocabulary and grammar.
- Use bright felt-tip markers to mark important words, passages, or illustrations.
- If possible, use a translator for important concepts.
- Work closely with LEP support personnel.
- Keep homework assignments short.
- Check for comprehension by asking the student to repeat what you have said.
- Use simple sentences when writing test items so the student can concentrate on answering the question rather than deciphering it.

Instructing Disadvantaged Students

Disadvantaged students typically dislike school, lack motivation, and have low self-esteem. Therefore, a teacher's personal commitment to and high expectations for these students may be two of the biggest single factors that will make a positive difference in their lives. Additionally, a teacher's good example (e.g., being patient, understanding, well organized, and a good manager) can be extremely valuable in motivating and positively shaping their behavior.

Vocational education teaches the disadvantaged student academic and social skills that can help him or her find employment. The following are additional techniques and teaching strategies that can be very useful to the teacher who works with disadvantaged students.

- The teacher should seek to understand the student's educational and social background through (a) assessment information, (b) interaction with former teachers, (c) discussions with counselors, and (d) visits with parents to ascertain the student's social limitations and home situation.
- Basic math, communication, and social skills should be reinforced. Math skills can be reinforced through hands-on learning activities. Communication skills can be improved by tactfully correcting poor grammar, when appropriate, and by providing resources that encourage reading about job-related interests. Social skills such as getting along with

people, grooming, proper dress, and respect for property and authority should be reinforced continually.

- The importance of graduating should be continually stressed. Relate acquisition of job skills to the ability to earn income.
- Improve the student's feelings of self-worth by having high expectations for him/her and by providing immediate approval of work done well.
- Simulate realistic job situations. All classroom and laboratory experiences should relate to employment in the occupation being studied.
- Disadvantaged students (as all students) will typically react to the learning environment in a responsible and mature manner when they are treated with respect and as adults by the teacher.
- Good organization and firm but not overbearing discipline are especially important. Generally, disadvantaged students want and need structure and discipline within their lives. Usually, these individuals will be responsive to and respect teachers who are firm, but sensitive.
- Help the student develop the skills necessary for finding, applying for, and retaining a job.
- Help the student establish good work habits by keeping him or her involved in meaningful learning experiences. Each activity should have concrete objectives.
- Disadvantaged students may need extra encouragement to stay on task; however, they still should be required to complete all assignments (just as they will be required to do on the job).
- Present instructions and information in clear, logical steps, building from the simple to the complex.
- Technical terms should be pronounced and explained clearly and concisely and written in language which the students will understand.
- Use a variety of teaching methods (e.g., demonstrations, resource personnel, field trips, peer tutors, role playing, audiovisual aids, and on-site work experiences).
- Present supplemental material when appropriate. If such material is relevant to the acquisition of job skills, the student will not be humiliated by simplified material.
- Highlight important parts of the student's text with a light marker to prevent the student from feeling overwhelmed by a large volume of reading material.
- Use progress charts to motivate disadvantaged students to master new skills.
- Use flashcards (teacher-made or commercial) to reinforce new terms and the ways to use tools and equipment.

GENERIC GUIDELINES AND INSTRUCTIONAL STRATEGIES

When teaching special needs students, it is very important that instructors not limit their teaching techniques. The following is a summary of techniques and strategies that could be considered generic to all special needs populations.

- Involve as many different senses as possible.
- Use concrete terms.
- Have students repeat important information.
- Use lists rather than paragraphs for written directions.
- Teach by demonstration.
- Use hand-over-hand assistance when necessary.
- Allow practice time.
- Break complex operations into smaller tasks.
- Provide immediate feedback.
- Build confidence.

- Help students make correct discriminations.
- Help students with their retention/memory.

- Build rapport.
- Use appropriate body language.
- Use appropriate techniques when working with an interpreter.
- Maintain good eye contact.
- Speak slowly and clearly.
- Rephrase thoughts when necessary.
- Encourage the student to read ahead.
- Keep the noise level down.
- Use various forms of media.
- Use lights to indicate when dangerous machinery is on.
- Work cooperatively with therapists.
- Encourage peer tutoring.
- Try not to act uncomfortable around special needs students.
- Help students feel comfortable.
- Model correct sentence structure.
- Develop a list of technical terms for students and therapists.

- Orient students before the course begins.
- Provide handouts ahead of time.
- Keep the student's attention.
- Use tape recorders for taking notes.
- Try to understand the student.
- Communicate acceptance.
- Develop activities that can help the students experience success.

- Use appropriate behavior-management techniques.
- Facilitate the students' note-taking.
- Facilitate the students' exam-taking.

- Pair students.
- Enlarge charts and diagrams.
- Use clear, readable visual aids frequently.
- Provide an outline of classroom material.

- Give writing assignments.
- Use task analysis when necessary.
- Allow for individual differences.
- Encourage students to bring a dictionary.
- Use a felt-tip marker to highlight important passages.
- Do not make homework assignments too lengthy.
- Use simple sentences when writing tests.

- Simulate realistic job situations.
- Treat all students with respect and dignity.
- Provide structure and organization.
- Use progress charts.
- Use flashcards.

BASIC SKILLS REMEDIATION

It is very important to note that to succeed in a vocational program some students may need to acquire one or more basic education skills (e.g., those for mathematics, reading, writing, speaking, listening, interpersonal relations, or reasoning.). Many employers will not hire an individual if he or she lacks these skills. Therefore, instruction in basic education skills may be necessary.

MODIFICATION OF THE CURRICULUM

Purpose of Curriculum Modification

The teacher may need to modify a special-needs student's curriculum to take into account his or her particular needs. The term *curriculum modification* can be defined as tailoring an existing curriculum to the unique needs of students as they pursue an occupational goal. However, it should be strongly emphasized that modifying a curriculum **does not** mean that a teacher should lower or alter the *standards* of his or her program. What it **does** mean is that the Admission Review and Dismissal (ARD) Committee (for handicapped students) or coordinated planning team (for disadvantaged and LEP students) determines which essential elements in the regular school curriculum would be appropriate to a student's needs. The *State Board of Education Rules for Curriculum* offers the following key points (Texas Education Agency, 1985):

1. For students with special needs, school districts shall provide modifications in methodologies, pacing, and materials to ensure that instruction is delivered, as appropriate, in the essential elements.
2. Students with special needs shall be instructed in those same essential elements in a manner appropriate to their needs.
3. School districts shall implement the provisions (under Chapter 75) in a manner which will enable all students to participate actively in a well-balanced curriculum and master, to the best of their abilities, the knowledge, skills, and competencies established through the essential elements.
4. Specialized personnel and regular program personnel shall be jointly responsible for the cooperative delivery of effective instruction in the essential elements, as appropriate.

Responsibilities of the Vocational Teacher

The primary responsibility of the vocational teacher in the curriculum modification process is to help the special needs student establish and reach realistic occupational goals. In an effort to accomplish this, the vocational teacher must identify the following:

1. Pertinent information about what will be taught in a vocational program
2. Necessary requirements for program completion
3. Multiple exit points (jobs that the learner can prepare for in a vocational program)
4. Entry-level competencies expected by employers for each of the exit points

It is also the responsibility of every vocational teacher to establish an effective and wholesome learning environment for his/her students. Doing this may involve modifying the vocational facility, equipment, tools, and/or instruction. Information on how to do this is provided in the following section.

MODIFICATION OF THE LEARNING ENVIRONMENT

The term *learning environment* refers to both the **physical** and **instructional** setting of the vocational classroom/laboratory. It is the responsibility of each vocational teacher to work at developing a learning environment that will contribute to the overall well-being and success of every student. The key factors found in a wholesome learning environment are those which promote:

1. **Safety, organization, and physical comfort.** In the vocational laboratory, it is absolutely crucial that each student abide by safety rules set by the instructor. In addition, the laboratory should be kept well organized and clean. A laboratory which is safe, well organized, and physically comfortable helps promote high morale and good work habits.
2. **Respect and acceptance.** Within an effective learning environment, students will show respect not only for the instructor but for each other as well. The instructor should be the student's best role model. The care and acceptance given by the instructor to each student (disabled or not) will go a long way in promoting peer acceptance, a positive attitude, and healthy self-esteem.
3. **Discipline.** A wholesome learning environment is one which promotes discipline and a positive self-concept within each student. Inappropriate behavior has the potential to seriously affect classroom safety, morale, and the overall learning process. Ways in which the instructor can help the student modify inappropriate behavior include (a) using the time-out technique, (b) developing student-teacher contracts, (c) ignoring negative behavior when possible, and (d) rewarding appropriate behavior with approval and praise.
4. **Flexibility.** An effective learning environment is flexible and can adapt to a special student's unique needs (e.g., slower rate of learning, inability to use regular tools/equipment, or remedial needs in reading or math). A flexible environment fosters individualized programs through which a special learner can develop marketable skills.

For information on modifying facilities, equipment, and tools for a vocational classroom, refer to the *Vocational Special Needs Teacher Training Curriculum*, available from the Extension Instruction and Materials Center.

The Texas Teacher Appraisal System

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The Texas Teacher Appraisal System (TTAS) is here to stay. Thus, it is to our advantage to examine it as closely as possible and to learn as much as possible about what the appraisers are looking for. This unit will help you to do that. It is **not** a complete description or explanation of the appraisal system, and it is **not** a substitute for the official TEA publication, *Teacher Appraisal System Teacher Orientation Manual*. However, it does address often misunderstood issues that are important to Texas teachers.

Historical Background

House Bill 72, enacted in 1984 by the 69th Texas State Legislature, directed the State Board of Education to adopt an appraisal process and criteria with which to appraise the performance of teachers for career ladder purposes. It mandated that these criteria be based upon observable, job-related behaviors. The system was to provide (1) at least two appraisals for each teacher (two observations by each of two appraisers); (2) a uniform training and certification process for appraisers; and (3) teacher self-appraisal as part of the appraisal process. A Teacher Appraisal Advisory Committee was appointed by the State Board to assist in the development of this appraisal system. That committee was composed of teachers, administrators, regional education service center personnel, and representatives from institutions of higher education.

A teacher appraisal instrument was developed and then refined through expert review, a pilot project in six Texas school districts, and input at public hearings. Approximately 13,000 appraisers were certified in the summer of 1986, after completing a 43-hour training course and meeting a minimum proficiency of 70% on knowledge of the system and in scoring videotaped segments of instruction. The Texas Teacher Appraisal System was implemented on a statewide basis in the fall of 1986. In 1987, the system was refined, and all certified appraisers were required to be recertified.

The Texas teacher appraisal process is a systematic set of activities designed to assess teacher performance. It includes teacher assessment of instructional goals and outcomes, observations, conferences, development of growth plans, and completion and/or scoring of appropriate forms for each of these activities.

Foundations of the TTAS

The appraisal system is not intended to measure the "whole teacher." Instead, its intent is to evaluate observable classroom teaching skills for professional development purposes and for teacher placement on the career ladder. This system is based on a particular view of teaching and ideas that the State Board believes to be true. These foundations of the TTAS are as follows.

1. Teaching is an intentional act which has student growth as its goal. And, although classroom teaching is the system's primary focus, *no single model of teaching is mandated.*
2. There are common, effective teaching characteristics that can serve as a basis for evaluation. All teachers, regardless of career ladder status, will be evaluated by these same criteria.
3. The difference between successful master and successful beginning teachers will be evidenced in the number of skills exhibited by the teachers at levels of quality which meet or exceed stated expectations.
4. Every teacher is capable of improving.
5. Appropriate classroom teaching behaviors may vary according to the learning goals and objectives of the lesson observed.

6. A more accurate appraisal can be gained by using multiple appraisers and multiple sources of information.

Selected Rules Governing the TTAS

The following section highlights selected rules governing the Texas Teacher Appraisal System. For more information, see the official TEA publication, *Teacher Appraisal System Teacher Orientation Manual.*

1. One appraiser must be the teacher's supervisor and hold an administrator or supervisor certification.
2. The second appraiser must be approved by the local school board, hold a valid teaching certificate, and have at least two years' teaching experience. Teachers serving as appraisers must be on a level of the career ladder at least as high as that of the teacher being appraised. All appraisers must receive uniform appraiser training, reach the required standards of proficiency, and undergo periodic recertification.
3. Each teacher must receive an orientation prior to his or her first appraisal and receive a copy of the teacher appraisal orientation manual.
4. A *minimum* of two appraisals of each teacher will occur each year. A *minimum* of one formal observation of 45 consecutive minutes is required for each appraisal.
5. Either the teacher or the appraiser can request shorter, unscheduled, formal observations when the nature of the teaching assignment requires shorter instructional segments. If both parties agree, each observation may be comprised of two to three instructional segments of not less than 15 minutes each.
6. Appraisals must be conducted during the required days of instruction for students during the school year. Appraisals will *not* take place the first two weeks of the school year, the day before any official school holiday, or on any other days designated by the local board as inappropriate.
7. Teachers will be observed while teaching classes for which they are certified, whenever possible.
8. Only one appraiser may conduct a formal observation at a time.
9. A copy of the written appraisal record will be given to the teacher within seven working days of the formal observation.
10. If a teacher is deemed unsatisfactory in one or more domains during a formal observation, a conference between the teacher and the appraiser must be scheduled within 10 working days of the observation. (Extensions for emergencies must not extend past 15 working days.) If a teacher is judged less than satisfactory in one or more domains at the end of an appraisal period, a professional growth plan must be developed that provides at least one option that places no significant financial burden on the teacher or the local district.
11. A teacher with an overall summary performance score of "satisfactory" may request a growth plan.
12. Fulfillment of the provisions of a growth plan does not guarantee career ladder advancement.
13. A teacher may submit a written response to an observation record within 10 working days of receiving the record.
14. Each teacher will complete and submit the first part of the Teacher Assessment of Instructional Goals and Outcomes form (self-appraisal form) no later than the end of the second six weeks. He/she will complete the second part of the form during the week prior to the summative conference and submit it at that conference.
15. Each appraiser will score Domains I-IV, and the teacher's primary appraiser will score Domain V. Domain V will not be included in the computation of scores for career ladder placement.
16. An appraiser must provide written documentation when "absent" or "below expectation" is recorded for any indicator or when exceptional quality credit is granted for any criterion.

The TTAS Instrument

The following section highlights selected issues surrounding the Texas Teacher Appraisal System instrument. It also includes a listing of the domains, criteria, and indicators of the instrument. For more information, see the official TEA publication, *Teacher Appraisal System Teacher Orientation Manual*.

Terms and Concepts to Understand. Understanding the following terms and concepts is important to understanding the TTAS instrument.

Domain—a broad category of teaching behaviors or indicators of those behaviors.

Criterion—a subgroup of specific teaching behaviors or indicators of those behaviors.

Indicator—the actual unit of observation that must be observable, job related, and research based. Indicators can occur simultaneously.

85% vs 100% —some indicators require only that the designated behaviors occur a preponderance of the time—that is, 85% of the time—to earn credit. Other indicators require that the behaviors always occur—100% of the time—to earn credit.

Exceptional Quality (EQ)—measured by quality (impact on students), quantity (how much), and preponderance (how often).

Domains. The Texas Teacher Appraisal System instrument includes 5 domains: instructional strategies, classroom management and organization, presentation of subject matter, learning environment, and professional growth and responsibilities.

Domain I—Instructional Strategies is a domain in which teaching strategies are the primary focus. The effectiveness of these strategies is judged by their observed impact upon the students' behaviors. The following apply to this domain.

- Credit is earned by evidence that the instructional strategies occur in preponderance (85% or more of the time).
- EQs may be earned with highly appropriate activities (how well) with intense student involvement (how much) throughout the observation period (how often).
- Credit may be lost through missed opportunities for extending, lack of ample "wait-time" (at least 3 seconds), and inappropriate levels of difficulty (either too hard or too easy).
- Evaluation of appropriate level of difficulty takes into consideration the students' ages, the students' attention spans, and the material's complexity.
- Observable formative evaluation of student progress by the teacher is important.
- Monitoring, reinforcement, and feedback behaviors must be specific, not global, and must involve as many students as possible.

Domain II—Classroom Management and Organization is a domain that measures teachers' administrative and management abilities. It is not related to instruction or to content. In this domain, the primary indicator is the teacher's ability to organize materials and students so as *to increase the probability of student learning*. The following apply to this domain.

- Preponderance (85% or more) is the issue in this domain. Do the students look as if they understand what is going on, and are they able to follow through with instructions and routines in a way that enhances learning?
- Credit will be lost through procedures that are inappropriately sequenced, unorganized, or too organized and complex.
- Credit can be lost by showing favoritism or applying special rules to special students.
- Significant factors in criterion 5, manages student behavior, include (1) the degree to which students understand the teacher's expectations, (2) whether the teacher identifies inappropriate behavior, and (3) how quickly the teacher redirects inappropriate behavior. For the teacher to gain credit, his/her response to inappropriate behavior must be immediate and direct; this response can be verbal or nonverbal.
- An EQ may be earned by providing responses or reinforcements that are (1) immediate; (2) direct; (3) applicable to specific behaviors, either individual or global; and (4) consistent throughout the period to the degree that all students have an opportunity to receive them.

Domain III—Presentation of Subject Matter is focused on content, not on sequence or instructional strategies. The most important overall indicator of accomplishment in this domain is that a majority of the students experience success in understanding the subject most of the time. By and large, the appraiser looks to students for their reactions, interest, and questions that indicate the appropriateness and their understanding of the content. The following apply to this domain.

- Critical content attributes must be presented in an understandable sequence and must be specifically emphasized.
- Drill and practice are not adequate.
- Credit will be lost by presenting one incorrect fact.
- Credit will be lost from two or more errors in spelling or written grammar, or two or more errors in oral grammar.
- EQs may be earned by (1) clearly emphasizing critical content attributes in desirable sequences, (2) teaching to many learning levels, and (3) expressing content in different modalities.

Domain IV—Learning Environmentt is the humane domain. Its primary focus is whether (1) the teacher treats students with respect, (2) students feel free to take learning risks, (3) motivation and teacher support are evident, and (4) the teacher personalizes the lesson to the students. The following apply to this domain.

- The appraiser looks for a preponderance of evidence (85% or more) that students are challenged in a positive way, that reluctant learners are encouraged, and that learning efforts are praised and reinforced.
- Correctives must be made in a positive way, with the teacher showing regard for students as people.
- Credit may be lost through one occurrence of sarcasm or negative criticism.

Domain V—Professional Growth and Responsibilities is the domain that is scored only by the teacher's primary appraiser. It is not used for career ladder assignment, but it can be used as a consideration in contract renewal. The extent of extracurricular involvement can be evaluated here. Cumulative data can be very important in this domain (see following section).

Cumulative Data. Cumulative data is written documentation of job-related teacher performance that is observed outside the formal classroom evaluation. It involves the teacher's day-to-day performance of his or her responsibilities and can become a part of the formal appraisal. The following apply to cumulative data.

- Additions to or deletions from the teacher's overall score can be made at any time before the summative conference.
- Each addition or deletion must be documented by the teacher's supervisor, the change must be initialed, and written evidence of the change must be presented to the teacher within 7 working days of the occurrence or the supervisor's knowledge of the occurrence.
- All cumulative data must be from a reliable source, factual, specific, dated, and have explicit or implicit relevance to the TTAS requirements.

Outline of Texas Teacher Appraisal Instrument

Domain I. Instructional Strategies

Criterion 1. Provides opportunities for students to participate actively and successfully

Indicator
- a. appropriately varies activities
- b. interacts with students in group formats as appropriate
- c. solicits student participation
- d. extends students' responses/contributions
- e. provides ample time for students to respond to teacher questions/solicitations *and* to consider content as it is presented
- f. implements instruction at an appropriate level of difficulty

Criterion 2. Evaluates and provides feedback on student progress during instruction

Indicator
- a. communicates learning expectations
- b. monitors students' performances as they engage in learning activities
- c. solicits responses or demonstrations from specific students for assessment purposes
- d. reinforces correct responses/performances
- e. provides corrective feedback/clarifies, or none needed
- f. reteaches, or none needed

Domain II. Classroom Management and Organization

Criterion 3. Organizes materials and students

Indicator
- a. secures student attention, or students are attending
- b. uses administrative procedures and routines which facilitate instruction
- c. gives clear administrative directions for classroom procedures or routines, or none needed
- d. maintains seating arrangements/grouping appropriate for the activity and the environment
- e. has materials, aids, and facilities ready for use

Criterion 4. Maximizes amount of time available for instruction

Indicator
- a. begins promptly/avoids wasting time at the end of the instructional period
- b. implements appropriate sequence of activities
- c. maintains appropriate pace
- d. maintains focus
- e. keeps students engaged

Criterion 5. Manages student behavior

Indicator
- a. specifies expectations for class behavior, or none needed
- b. uses techniques to prevent off-task behavior, or none needed
- c. uses techniques to redirect/stop inappropriate/disruptive behavior, or none needed

d. applies rules consistently and fairly, or none needed
e. reinforces desired behavior when appropriate

Domain III. Presentation of Subject Matter

Criterion 6. Teaches for cognitive, affective, and/or psychomotor learning

Indicator a. begins instruction/activity with an appropriate introduction
b. presents information in an appropriate sequence
c. relates lesson content to prior or future learning
d. provides for definition of concepts and description of skills and/or attitudes and interests
e. provides for elaboration of critical attributes of concepts, skills, and/or attitudes and interests
f. stresses generalization, principle, or rule as a relationship between or among concepts, skills, or attitudes/interests
g. provides opportunities for application
h. closes instruction appropriately

Criterion 7. Uses effective communication skills

Indicator a. make no significant errors
b. explains content and/or learning tasks clearly
c. stresses important points and dimensions of content
d. uses correct grammar
e. uses accurate language
f. demonstrates skill in written communication

Domain IV. Learning Environment

Criterion 8. Uses strategies to motivate students for learning

Indicator a. relates content to student interests/experiences
b. emphasizes the value/importance of the activity or content
c. reinforces/praises learning efforts of students
d. challenges students

Criterion 9. Maintains supportive environment

Indicator a. avoids sarcasm and negative criticism
b. establishes climate of courtesy and respect
c. encourages slow and reluctant students
d. establishes and maintains positive rapport with students

Domain V. Professional Growth and Responsibilities

Criterion 10. Plans for and engages in professional development

Indicator a. shows progress in completing professional growth requirements as agreed upon with appraiser(s), or none needed
b. stays current in content taught
c. stays current in instructional methodology

Criterion 11. Interacts and communicates effectively with parents

Indicator
- a. initiates communications with parents about student performance and/or behavior when appropriate
- b. conducts parent-teacher conferences in accordance with local district policy
- c. reports students' progress to parents in accordance with local district policy
- d. maintains confidentiality unless disclosure is required by law

Criterion 12. Complies with policies, operating procedures, and requirements

Indicator
- a. follows statutory and Texas Education Agency regulations
- b. follows district and campus policies and procedures
- c. performs assigned professional duties
- d. follows district promotion/retention policy and procedures

Criterion 13. Promotes and evaluates student growth

Indicator
- a. participates in campus goal-setting for student progress
- b. plans instruction in accordance with district requirements
- c. documents student's progress
- d. maintains accurate records
- e. reports student's progress at appropriate intervals

Section Two

Materials for Developing a Scope and Sequence

- Description of Text and Support Materials
- Chapters in *Marketing Essentials*, with Correlations to Specific Essential Elements
- Assignments in *Preparing to Succeed in Marketing*, with Correlations to Former Common Essential Elements
- ME-I Essential Elements Addressed by *Marketing Essentials* and EIMC-Educational Resources Materials
- Overview of a Recommended Scope and Sequence
- Workspace for Teacher Revision of Overview
- Worksheet for the Recommended Scope and Sequence, Based on *Marketing Essentials*
- Worksheet for a Teacher-Developed Scope and Sequence

All worksheets may be photocopied for teacher use.

Description of Text and Support Materials

Marketing Essentials. Published 1991 by Glencoe/McGraw-Hill. Written by Lois Schneider Farese, marketing education teacher-coordinator, Northern Highlands Regional High School, Allendale, New Jersey; Grady Kimbrell, educational consultant in Santa Barbara, California; and Carl A. Woloszyk, associate professor, Department of Consumer Resources and Technology, Western Michigan University.

Beginning with the 1991–1992 school year, this is the only state-adopted text for Marketing Education I. In many ways it is a much more self-sufficient publication than previous texts have been. Because there is only one text, it has been possible to streamline this scope and sequence as well as other materials in the revised coordinator's guide.

The text has more than 500 content pages, with 45 chapters arranged in eleven parts. These are listed later. The text coverage includes some content more directly suitable for the Marketing Education II course, so chapters need to be selected for ME-I.

Manual content has been correlated to the essential elements for Marketing Education I, and the publisher provides a correlation chart both separately and in the *Teacher's Annotated Edition*. That chart does not perfectly match the official essential elements, either as to numbering used or as to actual content. For that reason, the correlation charts in this guide should be consulted as well.

Additional materials beyond those in the text will be necessary, because of differences in content and because the common essential elements were added to ME-I after Proclamation 66. The list provided later should be consulted.

The *Teacher's Annotated Edition*, designed to meet textbook proclamation requirements, will make it easier for teachers to use the most current strategies of instruction. In addition, the text is supported by a student activity workbook, a marketing mathematics workbook, tests, and testmaker software.

Related Materials from EIMC-Educational Resources

Instruction for the course can be enhanced by using the following additional materials from EIMC-Educational Resources. Many of the publications are already available in Marketing Education classrooms.

- *Preparing to Succeed in Marketing*. This 1992 revision of an existing favorite has been rewritten to include all the former common essential elements that are now part of ME-I, with the exception of math-related elements covered by *Mathematics: Essential to Marketing* (see below).
- *Mathematics: Essential to Marketing*. The 34 assignments in this student manual make it an all-inclusive publication for use in all Marketing Education classrooms. It addresses the marketing math for ME-I as well as personal mathematics cited in the former common elements.
- *Higher Level Thinking in Marketing Education* has activities based on marketing content but designed to help develop thinking skills.
- *Glossary for Marketing Education* has many but not all of the terms used in Marketing Education. A set of *Flashcards for Marketing Education* also covers the same terms but in a different way.
- *Balancing the Curriculum for Marketing Education* is designed so that marketing content can be used to develop academic skills.
- *Overheads and Handouts for Marketing Education* is a set of single-concept masters developed to correlate to specific essential elements, including those for ME-I.
- *Parliamentary Procedure* is of use by DECA members for developing leadership skills. Software sets for computer-assisted instruction in this topic are also available.

The many individualized manuals for specific co-op placements can also strengthen the course in many ways, including relating content to specific jobs and providing information on career development.

Chapters in *Marketing Essentials*, with Correlations to Specific Essential Elements

The state-adopted text covers all the essential elements except for the former common elements which are correlated to the chapters in *Preparing to Succeed in Marketing* in the next chart. Both publications may be needed for full coverage.

Chapter Titles	Elements
Part 1. Economic Essentials	
1. Introduction to Economics	(2)(B), (6)(A)
2. The Free Enterprise System	(4)(A), (6)(B)
3. National and International Economics	(2)(A)
Part 2. Business and Marketing Essentials	
4. What Is Business?	(1)(A)(B)(C), (2)(B), (12)(K)
5. Marketing Concepts	(1)(B)
6. Identifying Markets	(1) in general
7. Channels of Distribution	(10)(A)(B)
Part 3. Human Resource Essentials	
8. Fundamentals of Mathematics	None
9. Communication Skills	(12)(C), (15)(A)(B)(C)(D)
10. Interpersonal Skills	(13)(B)(C)(D)(E)(F), (15)(D)
11. Management Skills	(5)(A)(B)(C), (14)(B)
12. What Is Selling?	(9)(A)(B)
Part 4. Selling	
13. Understanding Customers	(9)(B)
14. The Sales Process	(9)(B)
15. Determining Needs and Product Presentation	(9)(B)
16. Handling Customer Questions and Objections	(9)(B)
17. Closing the Sale and Follow-up	(9)(B)
18. Recording Sales	(11)(C)
Part 5. Promotion	
19. What Is Promotion?	(2)(C), (9)(D)
20. Advertising Media	(9)(D)
21. Preparing Written Advertisements	(9)(D)
22. Visual Merchandising and Display	(9)(D)
23. Publicity and Public Relations	(9)(D)
Part 6. Business and Distribution Operations	
24 Physical Distribution	(2)(C)
25. Receiving, Checking, and Shipping	(3)(C), (8)(B)

26. Stock and Inventory Control	(2)(C), (3)(C), (7)(B), (8)(A), (11)(A)
27. Risk Management	(2)(C), (4)(B)
28. Marketing Math Applications	(11)(B)
Part 7. Buying and Pricing Merchandise	
29. Price Planning	(9)(C)
30. Pricing Strategies	(9)(C)
31. Pricing Math	(9)(C), (11)(A)
32. Buying	(9)(C)
Part 8. Marketing Information Management	
33. What Is Market Research?	(2)(C), (9)(C)
34. Conducting Market Research	None
Part 9. Product Planning	
35. What Is Product Planning?	(2)(C)
36. Branding, Packaging, and Labeling	(2)(C)
37. Extended Product Features	(2)(C)
Part 10. Entrepreneurship	
38. What Is Entrepreneurship?	(2)(C), (6)(C)(D), (12)(A)
39. Describing and Analyzing a Proposed Business	None. Fits ME-II, Entrepreneurship better
40. Organizing a Business	None. Fits ME-II, Entrepreneurship better
41. Financing a Business	None. Fits ME-II, Entrepreneurship better
Part 11. Career Planning	
42. Careers in Marketing	(12)(A), (16)
43. Self-Assessment and Career Research	(12)(A)
44. Career Decision Making	(12)(A)(B)
45. Employability Skills	(12)(A)(B)(C), (15)(A)(B)(C)(D)

Assignments in *Preparing to Succeed in Marketing,* with Correlations to Former Common Essential Elements

This EIMC-Educational Resources student manual and its accompanying answer book/teacher's guide were developed to cover the common essential elements, most of which are now assigned to ME-I.

Assignment Titles	Elements
1. Staying Healthy: The Role of Diet, Exercise, and Fitness	(13)(A)(B)
2. Staying Clean and Maintaining Your Teeth	(13)(A)(B)
3. Grooming Your Skin, Hair, and Hands	(13)(A)(B)
4. Selecting and Caring for Your Clothes	(13)(A)
5A. Planning Your Wardrobe (for men)	(13)(A)
5B. Planning Your Wardrobe (for women)	(13)(A)
6. Your Personality	(13)(B)(C)(F)
7. Your Image: Choices That Influence How Others See You	(13)(B)(C)
8. How You Relate to Others	(13)(B)(C), (15)(C)
9. Goals for Your Career	(12)(A)(K), (13)(B)
10. Where Are You Now?	(12)(A), (13(B)
11. Your Resume	(12)(B), (13)(B)
12. The Interview	(12)(A)(B), (13)(B)(E)
13. What's Expected on Most Jobs	(12)(C)(D)(E)(F)(G)(I)(L)
14. How Jobs Become Careers, and Why You Shouldn't Stop Learning, Ever!	(12)(A), (13)(B)(E)
15. You and Communicating on the Job	(12)(C), (13)(B), (15)(A)(B)(C)(D)
16. Managing Your Money	(13)(B)
17. Stress Management	(12)(I), (13)(B)(E)(F), (14)(C)
18. You and the Management	(12)(D)(E)(F)(K)(L), (13)(B)(D)(E)(F), (14)(A)(B)(G)(H)(I)
19. Creating Your Own Success	(12)(C)(E)(F)(G)(H)(I)(J)(L), (13)(E)(F)

ME-I Essential Elements Addressed by *Marketing Essentials* and EIMC-Educational Resources Materials

(b) Marketing Education I (2-3 units) may be taught by the laboratory or the cooperative method of instruction

MEM = Mathematics: Essential to Marketing; PSM = Preparing to Succeed in Marketing

Textbook chapters and other sources	Elements
Ch. 6	**(b)(1) Basic marketing principles**
Ch. 4	(A) understand the role of marketing in American business;
Chs. 4, 5	(B) understand the basic vocabulary of marketing; and
Ch. 4	(C) define marketing as it impacts on consumers.
	(b)(2) Basic marketing functions
Ch. 3	(A) describe the application and use of economic resources in marketing;
Ch. 4	(B) understand how marketing impacts our standard of living; and
Chs. 19, 24, 26 27, 33, 35, 36, 37, 38	(C) learn how marketing is organized by its functions.
	(b)(3) Business policies, forms, and records
Various chs., EIMC co-op manuals	(A) interpret and carry out business policies; (B) follow employer's safety rules and regulations; and
Chs. 25, 26, others	(C) complete required business forms and records.
	(b)(4) Business environment, law, and ethics
Ch. 2	(A) understand how laws, policies, and regulations are applied to business situations; and
Ch. 27	(B) identify external and internal security procedures.
	(b)(5) Marketing management
Ch. 11	(A) identify the role and functions of management;
Ch. 11	(B) understand lines of authority; and
Ch. 11	(C) identify effective supervisory techniques.
	(b)(6) The free enterprise system and its benefits
Ch. 1	(A) analyze the risk and profit motive factor;
Ch. 2	(B) explain the concept of supply and demand;
Ch. 38	(C) understand types of business ownership; and
Ch. 38	(D) identify the role of the entrepreneur in a free enterprise system.

(b)(7) Computer literacy and applications

Ch. 26 (limited) See EIMC materials	(A) develop computer literacy applicable to marketing occupations; and
Ch. 26	(B) develop an awareness of specific applications of computers in marketing.

(b)(8) Inventory control systems

Ch. 26	(A) understand various inventory systems; and
Ch. 25	(B) check incoming stock and complete stock control records.

(b)(9) Merchandising, selling and service

Ch. 12	(A) identify the personality traits needed by an effective salesperson;
Chs. 12-17	(B) demonstrate the ability to assist a customer in making a good buying decision;
Chs. 29-33	(C) demonstrate the ability to merchandise products and services properly; and
Chs. 19-23	(D) understand the use of promotion for preselling.

(b)(10) The distribution process and systems

Ch. 7	(A) identify channels of distribution and use appropriate terminology; and
Ch. 7	(B) select appropriate channels for products and services.

(b)(11) Marketing mathematics

	(For all math elements, see also *Mathematics: Essential to Marketing)*
Chs. 26, 31	(A) understand and apply markup, markdown, and stockturn;
Ch. 28	(B) demonstrate ability to calculate profit, loss, payroll, invoices, taxes; interest, sales slips, credit card purchases, and purchase orders; and
Ch. 18	(C) demonstrate proficiency in cashiering and cash register operations.

(b)(12) Successful employment and/or postsecondary training

Chs. 38, 42-45 *PSM*, 9, 10, 12, 14,	(A) identify employment opportunities and preparation requirements in chosen fields;
Chs. 44-45 *PSM*, 11, 12	(B) identify effective methods to secure and terminate employment;
Chs. 9, 45	(C) demonstrate effective communication skills (both oral and written) and follow through on assigned tasks;
PSM, 13, 15, 19	(D) demonstrate dependability and punctuality;
PSM, 13, 18	(E) demonstrate productive work habits and attitudes
PSM, 13, 18, 19	(F) understand the importance of taking pride in the quality of work performed;
PSM, 13, 18, 19	(G) recognize the dignity in work;
PSM, 13, 19	(H) develop skills in planning and organizing work;
PSM, 19	(I) apply required methods and sequences when performing tasks;
PSM, 13, 17, 19	(J) apply principles of time management and work simplification when performing assigned tasks;
PSM, 17, 18	

Ch. 4; *PSM*, 9	(K) identify ethical practices and responsibilities; and
PSM, 13, 19	(L) understand the importance of the application of organizational policies and procedures.

(b)(13) Human relations and personality development

PSM, 1-5	(A) understand the importance of maintaining good health and proper appearance for effective job performance;
Ch. 10; *PSM*, 1-3, 6-12, 14-18	(B) understand oneself and others;
Ch. 10; *PSM*, 6-8	(C) exercise self-control;
Ch. 10; *PSM*, 18	(D) accept and use criticism;
Ch. 10; *PSM*, 12 14, 17, 18, 19	(E) recognize basic human relationships as they relate to business success; and
Ch. 10; *PSM*, 6 17, 18, 19	(F) demonstrate characteristics for successful working relationships.

(b)(14) Personal and business management

PSM, 18	(A) explain how management assists in reaching personal and family goals;
Ch. 11; *PSM*, 18	(B) explain the management process;
PSM, 17	(C) describe the role of management in controlling stress;
MEM, 33	(D) identify and understand personal checking accounts;
MEM, 34	(E) identify and understand personal loan application processes;
MEM, 34	(F) identify and understand different financial institutions;
Ch. 11	(G) identify the role and functions of business management;
Ch. 11	(H) understand the lines of authority; and
Ch. 11	(I) identify effective supervisory techniques.

(b)(15) Business communication

Chs. 9, 45 *PSM* , 15	(A) demonstrate proficiency in oral and written business communication;
Chs. 9, 45 *PSM*, 15	(B) identify forms of business communication;
Chs. 9, 45 *PSM*, 8, 15	(C) demonstrate proficiency in using listening skills; and
Chs. 9, 10, 45 *PSM*, 15	(D) recognize the dynamics of nonverbal communications.

(b)(16) Specific occupational objectives of the students

Chs. 42-45 EIMC-Educational Resources publications and CAIs	

ME-I and other Marketing Education courses may also address these common elements:

Parliamentary Procedure and *Destination Leadership*

(1) Leadership concepts and skills

(A) demonstrate skills, characteristics, and responsibilities of leaders and effective group members;
(B) demonstrate a knowledge of parliamentary procedure principles;
(C) plan and conduct leadership activities; and
(D) prepare for effective citizenship and for participation in our democratic society.

EIMC-Educational Resources co-op materials

(4) Safety and safe working conditions

(A) identify and apply safe working practices to all training situations

Overview of a Recommended Scope and Sequence

This scope and sequence uses 41 of the 45 chapters in the state-adopted text, *Marketing Essentials,* and covers all the essential elements for ME-I except those former common elements addressed in *Preparing to Succeed in Marketing (PSM)* and *Mathematics: Essential to Marketing*. Those publications are for individualized instruction, and teachers may have widely varied opinions as to how best to incorporate them. Space at the right is for teacher notes about *PSM* and other nontextbook sources.

Chapters 34, 39, 40, and 41 in *Marketing Essentials* were omitted as more appropriate for Marketing Education II.

Two chapters in the text, Chapter 8 ("Fundamentals of Mathematics") and Chapter 28 ("Marketing Math Applications"), can be integrated into the course where they fit best.

Week	Chapter	*PSM* and other sources
	First Six Weeks	
1	Ch. 1. Introduction to Economics	
2	Ch. 2. The Free Enterprise System	
	Ch. 3. National and International Economics	
3	Ch. 4. What Is Business?	
	Ch. 5. Marketing Concepts	
	Ch. 6. Identifying Markets	
	Ch. 33. What Is Market Research?	
4	Job survival/orientation	
	Ch. 10. Interpersonal Skills	
5	Ch. 9. Communication Skills	
6	Ch. 42. Careers in Marketing	
	Reteach and evaluate	
	Second Six Weeks	
7	Ch. 12. What Is Selling?	
	Ch. 13. Understanding Customers	
8	Ch. 14. The Sales Process	
9	Ch. 15. Determining Needs and Product Presentation	
10	Ch. 16. Handling Customer Questions and Objections	
11	Ch. 17. Closing the Sale and Follow-up	
12	Ch. 18. Recording Sales	
	Practical applications, with activities for sales associates, for chapters 12-18	
	Reteach and evaluate	
	Ch. 29, Price Planning	

Week	Chapter	*PSM* and other sources
	Third Six Weeks	
13	Ch. 30. Pricing Strategies Ch. 8. Fundamentals of Mathematics	
14	Ch. 31. Pricing Math	
15	Ch. 31. Pricing Math (continued)	
16	Ch. 31. Pricing Math (continued)	
17	Ch. 32. Buying	
18	Reteach and evaluate	
	Fourth Six Weeks	
19	Ch. 19. What Is Promotion?	
20	Ch. 20. Advertising Media	
21	Ch. 21. Preparing Written Advertisements	
22	Ch. 22. Visual Merchandising and Display	
23	Ch. 23. Publicity and Public Relations	
24	Reteach and evaluate Ch. 7. Channels of Distribution	
	Fifth Six Weeks	
25	Ch. 24. Physical Distribution	
26	Ch. 25. Receiving, Checking, and Shipping	
27	Ch. 25. Receiving, Checking, and Shipping (continued) Ch. 26. Stock and Inventory Control	
28	Ch. 26. Stock and Inventory Control (continued)	
29	Ch. 11. Management Skills	
30	Reteach and evaluate	
	Sixth Six Weeks	
31	Ch. 27. Risk Management Ch. 38. What Is Entrepreneurship?	
32	Ch. 35. What Is Product Planning? Ch. 36. Branding, Packaging, and Labeling Ch. 37. Extended Product Features	
33	Ch. 43. Careers in Marketing	
34	Ch. 44. Self-Assessment and Career Research	
35	Ch. 45. Career Decision Making	
36	Reteach and evaluate	

Workspace for Teacher Revision of Overview

First Six Weeks	**Fourth Six Weeks**
1.	19.
2.	20.
3.	21.
4.	22.
5.	23.
6.	24.
Second Six Weeks	**Fifth Six Weeks**
7.	25.
8.	26.
9.	27.
10.	28.
11.	29.
12.	30.
Third Six Weeks	**Sixth Six Weeks**
13.	31.
14.	32.
15.	33.
16.	34.
17.	35.
18.	36.

Worksheet for the Recommended Scope and Sequence

Based on *Marketing Essentials*

Note: Content from nontextbook sources will need to be added. The committee recommends chapter tests as well as unit tests. Time should also be allocated for individualized instruction.

First Six Weeks

Week/ dates	Portion of Text to Cover	Additional activities and instruction
Week 1	Ch. 1. Introduction to Economics	Allow time for
		administrative details,
		starting school year.
	Individualized instruction:	
Week 2		
	Ch. 2. The Free Enterprise System	
	Ch. 3. National and International	
	Economics	
	Individualized instruction:	

First Six Weeks (Continued)

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 3		
	Ch. 4. What Is Business?	
	Ch. 5. Marketing Concepts	
	Ch. 6. Identifying Markets	
	Ch. 33. What Is Market Research?	
	Individualized instruction:	
Week 4		
	Job survival/orientation	
	Ch. 10. Interpersonal Skills	
	Individualized instruction:	
Week 5		
	Ch. 9. Communication Skills	
	Individualized instruction:	
Week 6		
	Ch. 42. Careers in Marketing	
	Reteach and evaluate	
	Individualized instruction:	

Second Six Weeks

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 7		
	Ch. 12. What Is Selling?	
	Ch. 13. Understanding Customers	
	Individualized instruction:	
Week 8		
	Ch. 14. The Sales Process	
	Individualized instruction:	
Week 9		
	Ch. 15. Determining Needs	
	and Product Presentation	
	Individualized instruction:	
Week 10		
	Ch. 16. Handling Customer Questions	
	and Objections	
	Individualized instruction:	
Week 11		
	Ch. 17. Closing the Sale and	
	Follow-up	
	Ch. 18. Recording Sales	
	Individualized instruction:	
Week 12		
	Practical applications, with sales-	
	related activities, for chapters 12-17	
	Reteach and evaluate	
	Ch. 29. Price Planning	
	Individualized instruction:	

Third Six Weeks

Week/ dates	**Portion of text to cover**	**Additional activities and instruction**
Week 13		
	Ch. 30. Pricing Strategies	
	Ch. 8. Fundamentals of Mathematics	
	Individualized instruction:	
Week 14		
	Ch. 31. Pricing Math	
	Individualized instruction:	
Week 15		
	Ch. 31. Pricing Math (continued)	
	Individualized instruction:	
Week 16		
	Ch 31. Pricing Math (continued)	
	Individualized instruction:	
Week 17		
	Ch. 32. Buying	
	Individualized instruction:	
Week 18		
	Reteach and evaluate	
	Individualized instruction:	

Fourth Six Weeks

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 19		
	Ch. 19. What Is Promotion?	
	Individualized instruction:	
Week 20		
	Ch. 20. Advertising Media	
	Individualized instruction:	
Week 21		
	Ch. 21. Preparing Written Advertisements	
	Individualized instruction:	
Week 22		
	Ch. 22. Visual Merchandising and Display	
	Individualized instruction:	
Week 23		
	Ch. 23. Publicity and Public Relations	
	Individualized instruction:	
Week 24		
	Reteach and evaluate	
	Ch. 7. Channels of Distribution	
	Individualized instruction:	

Fifth Six Weeks

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 25		
	Ch. 24. Physical Distribution	
	Individualized instruction:	
Week 26		
	Ch. 25. Receiving, Checking, and	
	Shipping	
	Individualized instruction:	
Week 27		
	Ch. 25. Receiving, Checking, and	
	Shipping (continued)	
	Ch. 26. Stock and Inventory Control	
	Individualized instruction:	
Week 28		
	Ch. 26. Stock and Inventory	
	Control (continued)	
	Individualized instruction:	
Week 29		
	Ch. 11. Management Skills	
	Individualized instruction:	
Week 30		
	Reteach and evaluate	
	Individualized instruction:	

Sixth Six Weeks

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 31		
	Ch. 27. Risk Management	
	Ch. 38. What Is Entrepreneurship?	
	Individualized instruction:	
Week 32		
	Ch. 35. What Is Product Planning?	
	Ch. 36. Branding, Packaging, and Labeling	
	Ch. 37. Extended Product Features	
	Individualized instruction:	
Week 33		
	Ch. 43. Careers in Marketing	
	Individualized instruction:	
Week 34		
	Ch. 44. Self-Assessment and Career Research	
	Individualized instruction:	
Week 35		
	Ch. 45. Career Decision Making	
	Individualized instruction:	
Week 36		
	Reteach and evaluate	
	Individualized instruction:	

Worksheet for a Teacher-Developed Scope and Sequence

Note: Content from nontextbook sources may need to be added. Also consider whether to add time for tests and individualized instruction.

First Six Weeks

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 1		
	Individualized instruction:	
Week 2		
	Individualized instruction:	

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 3		
	Individualized instruction:	
Week 4		
	Individualized instruction:	
Week 5		
	Individualized instruction:	
Week 6		
	Reteach and evaluate	
	Individualized instruction:	

Second Six Weeks

Week 7		
	Individualized instruction:	

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 8		
	Individualized instruction:	
Week 9		
	Individualized instruction:	
Week 10		
	Individualized instruction:	
Week 11		
	Individualized instruction:	
Week 12		
	Reteach and evaluate	
	Individualized instruction:	

Third Six Weeks

Week 13		
	Individualized instruction:	

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 14		
	Individualized instruction:	
Week 15		
	Individualized instruction:	
Week 16		
	Individualized instruction:	
Week 17		
	Individualized instruction:	
Week 18		
	Reteach and evaluate	
	Individualized instruction:	

Fourth Six Weeks

Week 19		
	Individualized instruction:	
Week 20		

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 21		
	Individualized instruction:	
Week 22		
	Individualized instruction:	
Week 23		
	Individualized instruction:	
Week 24		
	Reteach and evaluate	
	Individualized instruction:	

Fifth Six Weeks

Week 25		
	Individualized instruction:	
Week 26		
	Individualized instruction:	

Week/ dates	Portion of text to cover	Additional activities and instruction
Week 27		
	Individualized instruction:	
Week 28		
	Individualized instruction:	
Week 29		
	Individualized instruction:	
Week 30		
	Reteach and evaluate	
	Individualized instruction:	

Sixth Six Weeks

Week 31		
	Individualized instruction:	
Week 32		
	Individualized instruction:	
Week 33		
	Individualized instruction:	

Week/ dates	**Portion of text to cover**	**Additional activities and instruction**
Week 34		
	Individualized instruction:	
Week 35		
	Individualized instruction:	
Week 36		
	Reteach and evaluate	
	Individualized instruction:	

Section Three

Instructional Planner Sheets

- Planners Based on Chapters in *Marketing Essentials*
- Planners Based on Assignments in *Preparing to Succeed in Marketing*

All planners may be photocopied for teacher use.

Instructional Planner for Chapter 1, Introduction to Economics

ME-I. (b)(6) The free enterprise system and its benefits
(b)(6)(A) analyze the risk and profit motive factor

Comments

This is one of three related chapters (1-3) that explain economics in general, compare economic systems, and discuss the free enterprise system in greater detail. Together, they stress two of the (b)(6) elements, with the other two left for later chapters.

INDICATORS OF CHAPTER CONTENT

Words to Know

goods, services, resources, scarcity, economy, market economy, democracy, command economy, communism, democratic socialism, profit

Subheads in Chapter

The Study of Economics—Goods and Services, Resources, The Concept of Scarcity
What Is an Economy?
The Types of Economic Systems—Market Economies, Command Economies, Differences between Economic Systems, Mixed Economies

RELATED MATERIALS

Special Needs Adaptations

Overheads and Handouts for Marketing Education contains the following single-concept masters, which may be useful with this chapter:

(b)(6)(A) 1. Private Enterprise Leads to Competition and Consumers Get to Vote
(b)(6)(A) 2. Competition by Innovation, Efficiency, and Productivity
(b)(6)(A) 3. Profits Helped Pave the Way from the Horse and Buggy Days to the Jet Age

Instructional Planner for Chapter 2, The Free Enterprise System

ME-I. (b)(4)(A) understand how laws, policies, and regulations are applied in business situations
(b)(6) The free enterprise system and its benefits
(b)(6)(B) explain the concept of supply and demand

Comments
This is one of three related chapters (1-3) that deal with economics in general and the free enterprise system in greater detail. Together, they include two of the (b)(6) elements, with the other two (C and D) left for later chapters. Chapter 2 also introduces the role of government in business regulation but does not go into detail.

INDICATORS OF CHAPTER CONTENT

Words to Know
competition, price competition, nonprice competition, monopoly, demand, elastic demand, inelastic demand, supply, modified free enterprise system

Subheads in Chapter

Basic Economic Freedoms—To Own Property, Open a Business, Compete, Make a Profit
Competition—Price and Nonprice Competition, Monopolies, Benefits of Competition
Supply and Demand—The Law of Demand; The Law of Supply; Surpluses, Shortages, and Equilibrium
The Role of Government—Provider of Services
Enforcer of Rules and Regulations—Antimonopoly Regulations, Consumer and Worker Protection, Other Regulations
Supporting the Economy

RELATED MATERIALS

Higher Level Thinking Skills
In *Higher Level Thinking in Marketing Education,* see Activity 3: Auction.

Academic Skills
In *Balancing the Curriculum for Marketing Education*, see Activity 14: Understanding the Elements and Advantages of the Free Enterprise System.

Special Needs Adaptations
Overheads and Handouts for Marketing Education has single-concept masters, which may be adapted. A useful master might be (b)(4)(A) Types of Rules Affecting Businesses. See also Chapter 1 comments.

Instructional Planner for Chapter 3, National and International Economics

ME-I. (b)(2)(A) describe the application and use of economic resources in marketing

Comments
Both this chapter and essential element (b)(2)(A) describe how the parts of an economy relate, and how the health of that economy is evaluated. However, there are major differences in content, and what to include will need careful consideration. The two transparency masters and the related terms should be helpful in supplementing the text with earlier material.

INDICATORS OF CHAPTER CONTENT

Words to Know
business cycle, Gross National Product (GNP), standard of living, Consumer Price Index (CPI), imports, exports, balance of trade, tariff, quota

Subheads in Chapter

Business Cycles—Factors that Affect Business Cycles
Measurement of an Economy—Gross National Product, Standard of Living, Consumer Price Index, Unemployment Figures, Other Indicators
International Trade—Reasons for International Trade, The Balance of Trade, Government Influence on International Trade, Other Factors that Influence Trade

RELATED MATERIALS

Special Needs Adaptations
Overheads and Handouts for Marketing Education contains the following single-concept masters, which may be adapted:

(b)(2)(A) 1. Consumers and Businesses Depend on Each Other
(b)(2)(A) 2. Consumers, Business, and Government in Our Economy
(b)(2)(A) 3. Relationships Between Income and Funds: Where the Money Goes

Instructional Planner for Chapter 4, What Is Business?

ME-I. (b)(1)(A) understand the role of marketing in American business
(b)(1)(B) understand the basic vocabulary of marketing (some terms)
(b)(1)(C) define marketing as it impacts on consumers
(b)(2)(B) understand how marketing impacts our standard of living
(b)(12)(K) identify ethical practices and responsibilities

Comments
This chapter primarily addresses (b)(1) Basic marketing principles and (b)(2) Basic marketing functions. It also introduces some basic vocabulary. It provides a background for thinking about ethical matters.

INDICATORS OF CHAPTER CONTENT

Words to Know
business, production, marketplace, marketing, management, finance, utility, ethics, consumerism

Subheads in Chapter

The Scope of U.S. Business—Nonprofit Organizations, Types of businesses
The Functions of Business—Production, Marketing, Management
The Business Utilities—The Production Utility, The Marketing Utilities of Place, Time, Possession, and Information
Benefits of Marketing—Lowering Prices, Developing New and Improved Products
Marketing and Social Responsibility—Ethical and Legal Concerns, Consumption of Natural Resources, Environmental Issues
Consumerism

RELATED MATERIALS

Academic Skills
In *Balancing the Curriculum for Marketing Education*, see Activity 15: Learn the Roles of the Consumer in Marketing.

Special Needs Adaptations
Overheads and Handouts for Marketing Education contains the following single-concept masters, which may be adapted:

(b)(1)A) Business Requires These Three Elements
(b)(1)(B) Four Keys Can Unlock the Gains to Success in Marketing
(b)(1)(C) Marketers, the Bridge between Producers and Consumers

For (B)(2)(B), see chapter 1 notes.

Instructional Planner for Chapter 5, Marketing Concepts

ME-I. (b)(1)(B) understand the basic vocabulary of marketing

Comments
This chapter includes the marketing mix, a basic marketing concept. Otherwise, it appears to be more closely matched to the second-year course and the cluster course than to Marketing Education I. These are the related subelements for those two courses: ME-II (c)(1)(B) marketing concept, (D) activities of competition; and Principles of Marketing (l)(1)(B) marketing concept, marketing mixs and (1)(2)(C) target markets and market segmentation.

INDICATORS OF CHAPTER CONTENT

Words to Know
market, mass marketing, market segmentation, geographics, demographics, lifestyle, marketing mix, market share, market position

Subheads in Chapter

The Marketing Philosophy—Sales vs. Marketing Orientation, Recognizing Opportunities
What Is a Market?
Marketing Approaches—Mass Marketing, Market Segmentation (Geographics, Demographics), Lifestyle, Product Benefits
Industrial Market Segmentation
Marketing Mix—Product Decisions, Place Decisions, Price Decisions, Promotion Decisions Market Share

RELATED MATERIALS

Higher Level Thinking Skills
In *Higher Level Thinking in Marketing Education*, see Activity 15: Integrating Theories and Concepts.

Instructional Planner for Chapter 6, Identifying Markets

ME-I. In general, (b)(1) Basic marketing principles

Comments

This chapter is closely related to Chapter 5. Although it includes basic marketing principles, it does not fit any subelement in Marketing Education I. It does includes two concepts from (b)(2)(A) application and use of economic resources in marketing. Otherwise, the chapter appears to be more closely matched to the second-year course and the cluster course than to Marketing Education I. These are the related subelements for ME-II: (c)(1)(B) marketing concept, and (c)(1)(D) activities of competition; it also fits Principles of Marketing (l)(1)(B) marketing concept, marketing mix; and (1)(2)(C) target markets and market segmentation.

INDICATORS OF CHAPTER CONTENT

Words to Know

disposable income, discretionary income, culture, social class, reference groups, family life cycle, industrial marketing, derived demand

Subheads in Chapter

Understanding the Consumer Market
- Consumer Demographics—Age, Ethnic Background, Family Structure and Gender, Income, Occupation, Education, Location
- Lifestyle and Psychographics—External Influences, Internal Influences, Analyzing Lifestyle Factors

The Industrial Market
- Organizations in the Industrial Market—Extractors, Construction and Manufacturing, Wholesalers and Retailers, Business and Professional Services, Institutions and Nonprofit Organizations, Governments

How the Industrial Market Derives Demand from the Consumer Market
    Industrial Buying Practices

Instructional Planner for Chapter 7, Channels of Distribution

ME-I. (b)(10) The distribution process and systems
- (b)(10)(A) identify channels of distribution and use appropriate terminology
- (b)(10)(B) select channels for products and services

INDICATORS OF CHAPTER CONTENT

Words to Know
channel of distribution, intermediary, wholesalers, retailers, direct distribution, indirect distribution, intensive distribution, selective distribution, exclusive distribution

Subheads in Chapter

- Distribution and the "Place" Utility
  - Beginnings and Ends
  - Channel Members—Merchant Intermediaries, Agents
  - Nonchannel Members
  - Direct and Indirect Channels
- Channels in the Consumer and Industrial Markets
  - The Consumer Market—Direct Distribution, Indirect Distribution
  - The Industrial Market—Direct Distribution, Indirect Distribution
- Considerations in Distribution—Nontraditional and Multiple Channels, Intermediaries, Control and Costs, Intensity

RELATED MATERIALS

Higher Level Thinking Skills
In *Higher Level Thinking in Marketing Education*, see Activity 10: Physical Distribution; and Activity 11: Popcorn Lesson,

Academic Skills
In *Balancing the Curriculum for Marketing Education*, see Activity 9: Identify Channels for Products and Services; Activity 10: Select Appropriate Channels for Products and Services; and Activity 11: Use Appropriate Terminology.

Special Needs Adaptations
Overheads and Handouts for Marketing Education contains the following single-concept masters which may be adapted:

(b)(10)(A) Channels of Distribution, Length
(b)(10)(B) Channels of Distribution, Width

Instructional Planner for Chapter 8, Fundamentals of Mathematics

ME-I. None directly.

Comments
This chapter is for students needing basic computational improvement before undertaking mathematics for marketing. It does not have a direct correlation to essential elements. It has not been assigned a place in the recommended scope and sequence because it might be used almost anytime in the course, and even several times.

INDICATORS OF CHAPTER CONTENT

Words to Know
digit, fractions, decimal number, reverse-entry system, percent

Subheads in Chapter

Writing Whole Numbers
Fractions
Decimal Numbers—Adding and Subtracting Decimal Numbers, Multiplying Decimal Numbers, Dividing Decimal Numbers
Using a Calculator
Percentages
Percent Problems

RELATED MATERIALS

Content
See *Mathematics: Essential to Marketing*, which contains 34 assignments that cover more marketing mathematics than the text. It is also designed to be used with the newest lesson plan sequence. The first six assignments concern these math calculations. The teacher's guide also includes pretests and posttests to determine if students need the review.

Specific assignments are

Assignment 1. Addition and Subtraction of Whole Numbers, Decimals, and Fractions
Assignment 2. Multiplication and Division of Whole Numbers, Decimals, and Fractions
Assignment 3. Weights and Measures
Assignment 4. Simple Interest
Assignment 5. Percentage, Base, and Rate
Assignment 6. Extensions

Instructional Planner for Chapter 9, Communication Skills

ME-I.	(b)(12)(C)	demonstrate effective communication skills (both oral and written) and follow through on assigned tasks
	(b)(15)(A)	demonstrate proficiency in oral and written business communication
	(b)(15)(B)	identify forms of business communication
	(b)(15)(C)	demonstrate proficiency in using listening skills
	(b)(15)(D)	recognize the dynamics of nonverbal communication

Comments

The first Marketing Education I curriculum guide did not have lesson planners for essential elements for communication, so none are included later in this guide.

INDICATORS OF CHAPTER CONTENT

Words to Know

communication, channels, feedback, blocks, setting, distractions, emotional blocks, jargon

Subheads in Chapter

The Communication Process—Senders and Receivers, Messages, Channels, Feedback, Blocks, Setting
Listening—Listening Skills, Blocks to Listening with Understanding
Reading—Know the Purpose of Your Reading, Read for Meaning
Speaking—Know the Purpose, Speaking Formally, Telephone Skills
Writing—Basic Considerations in Writing; Developing a Writing Style; Letters, Memos, and Reports

RELATED MATERIALS

Content

See the individualized instructional manual *Communication for Marketing*, available from EIMC-Educational Resources.

Higher Level Thinking Skills

In *Higher Level Thinking in Marketing Education*, see Activity 2: Opportunities Unlimited.

Academic Skills

In *Balancing the Curriculum for Marketing Education*, see Activity 1: Demonstrate an Ability to Speak and Write Clearly; and Activity 8: Identify Forms of Business Communication.

Instructional Planner for Chapter 10, Interpersonal Skills

ME-I.	(b)(13)(B)	understand oneself and others
	(b)(13)(C)	exercise self-control
	(b)(13)(D)	accept and use criticism
	(b)(13)(E)	recognize basic human relationships as they relate to business success
	(b)(13)(F)	demonstrate characteristics for successful working relation-ships
	(b)(15)(D)	recognize the dynamics of nonverbal communication

Comments
Chapter 10 touches upon human relations and personality development. The teacher may wish to go into more depth, as well as teach the elements at other times during the year. *Preparing to Succeed in Marketing* has assignments for that purpose. Nor does the textbook chapter cover (b)(13)(A), understand the importance of maintaining good health and personal appearance for effective job performance. That element is also addressed in detail in *Preparing to Succeed in Marketing*.

INDICATORS OF CHAPTER CONTENT

Words to Know
body language, empathize, assertive

Subheads in Chapter

Understanding Others
Influencing Others—Show an Interest in Others, Smile, Make Others Feel Important, Empathize, Let Others "Save Face," Admit Your Own Mistakes, Praise Lavishly, Accentuate the Positive, Be Assertive
Selling an Idea—Know Precisely What You Want, Catch the Mood, Solve Someone's Problem, Share Credit for Your Ideas, Answer Objections with Benefits, Show Gratitude
Personal Traits and Skills

RELATED MATERIALS

Content
EIMC-Educational Resources has available the following materials on this topic: *Preparing to Succeed in Marketing, Your Attitude Is Showing,* and *Attitude: Your Most Priceless Possession,* as well as individualized manuals with assignments stressing appearance and other aspects of human relations in specific jobs.

Higher Level Thinking Skills
See *Higher Level Thinking in Marketing Education.* Possibly useful with this chapter and topic are Activity 1: Preparing for Job Success; and Activity 4: Nice Sheet.

Academic Skills
In *Balancing the Curriculum for Marketing Education*, see Activities 2 and 3, which focus on maintaining good health and proper appearance for effective job performance.

Instructional Planner for Chapter 11, Management Skills

ME-I. (b)(5)(A) identify the role and functions of management
(b)(5)(B) understand lines of authority and (b)(14)(H) understand the lines of authority
(b)(5)(C) identify effective supervisory techniques and (b)(14)(I) identify effective supervisory techniques
(b)(14)(B) explain the management process

Comments

As the listing above indicates, there are duplicate essential elements in (b)(5) and (b)(14). This happened when the essential elements common to all Marketing Education courses were combined with Marketing Education I and renumbered. Management is covered in greater detail in Marketing Education II.

INDICATORS OF CHAPTER CONTENT

Words to Know

management, top management, middle management, supervisory-level management, planning, organizing, controlling

Subheads in Chapter

Levels of Management—Top Management, Middle Management, Supervisory-Level Management
Management Functions—Planning, Organizing, Controlling
Handling Responsibility—Advantages of Being a Manager, Disadvantages of Being a Manager
Effective Management Skills—Give Clear Directions, Train New Employees Well, Be Consistent, Treat Employees Fairly, Be Firm When Necessary, Consider Employees' Welfare, Set A Good Example, Delegate Responsibility
Managing through a System of Rewards

RELATED MATERIALS

Content

Business and Personal Management, available from EIMC-Educational Resources, was developed for Marketing Education II and is more appropriate for that course. However, it does have more thorough coverage of (b)(14)(A) explain how management assists in reaching personal and family goals; and (b)(14)(B) describe the management process. *Business and Personal Management* discusses the five functions of the management process developed by the American Management Association.

Academic Skills

In *Balancing the Curriculum for Marketing Education,* see Activity 21: Identify the Role and Function of Management.

Special Needs Adaptations

In *Overheads and Handouts for Marketing Education*, see (b)(5)(A) Five Functions of Management and (b)(5)(B) Sample Organization Chart.

Instructional Planner for Chapter 12, What Is Selling?

ME-I. (b)(9) Merchandising, selling, and service
  (b)(9)(A) identify the personality traits needed by an effective salesperson
  (b)(9)(B) demonstrate the ability to assist a customer in making a good buying decision

Comments
This is one of six chapters (12-17) that cover the selling process in detail. They do not address the last two subelements of (9), which involve merchandising and promotion and are covered elsewhere in the text.

INDICATORS OF CHAPTER CONTENT

Words to Know
selling, inside sales, outside sales, telemarketing

Subheads in Chapter

Why Study Selling and Selling Skills?—Definition of Selling
Basic Classifications of Selling—Inside Sales vs. Outside Sales, Type of Product, Telemarketing

RELATED MATERIALS

Content
EIMC-Educational Resources materials in this topical area include *Practical Selling*.

Special Needs Adaptations
Overheads and Handouts for Marketing Education contains the following single-concept masters, which may be adapted:

(b)(9)(A) First Impression—Clothing, Grooming, Facial Expressions, Posture
(b)(9)(B)1. Helping Make Good Buying Decisions

Instructional Planner for Chapter 13, Understanding Customers

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(B) demonstrate the ability to assist a customer in making a good buying decision

Comments
This is one of six chapters (12-17) that cover the selling process in detail. They do not address the last two subelements of element (9), which involve merchandising and promotion and are covered elsewhere in the text.

INDICATORS OF CHAPTER CONTENT

Words to Know
product feature, customer benefit, rational motive, emotional motive, stimulus, cognitive dissonance, extensive decision making, limited decision making, routine decision making

Subheads in Chapter

Developing Product Knowledge
Sources of Product Information—Direct Experience, Printed Materials, Other People, Formal Training
How to Use Product Information—Customer Benefits
Learning about the Customer—How Consumers Make Buying Decisions
Types of Decision Making

RELATED MATERIALS

Content
See *Practical Selling*, available from EIMC-Educational Resources.

Academic Skills
In *Balancing the Curriculum for Marketing Education*, see Activity 18: Inform Customers about Merchandise, Location, and Service; and Activity 19: Identify Appropriate Sources of Information,

Special Needs Adaptations
Overheads and Handouts for Marketing Education contains the following single-concept masters, which may be adapted:

(b)(9)(B) 2. The Buying Decision
(b)(9)(B) 3. The Buying Process—AIDCA

Instructional Planner for Chapter 14, The Sales Process

ME-I. (b)(9) Merchandising, selling and service
  (b)(9)(B) demonstrate the ability to assist a customer in making a good buying decision

Comments
This is one of six chapters (12-17) that cover the selling process in detail. They do not address the last two subelements of element (9), which involve merchandising and promotion and are covered elsewhere in the text.

INDICATORS OF CHAPTER CONTENT

Words to Know
prospect, endless chain method, cold canvassing, service approach method, greeting approach method, merchandise approach method

Subheads in Chapter

The Steps of a Sale
Prospecting—Sources and Method of Prospecting
Approaching the Customer—The Preapproach, The Preapproach in Retail Sales, The Preapproach in Industrial Sales, The Initial Approach

Instructional Planner for Chapter 15, Determining Needs and Product Presentation

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(B) demonstrate the ability to assist a customer in making a good buying decision

Comments
This is one of six chapters (12-17) that cover the selling process in thorough detail. They do not address the last two subelements of element (9), which involve merchandising and promotion and are covered elsewhere in the text.

INDICATORS OF CHAPTER CONTENT

Words to Know
nonverbal communication, open-ended question, layman's terms

Subheads in Chapter

Determining Needs—When to Determine Needs, Observing, Listening, Questioning
Product Presentation—Selecting Products, Number of Products, What to Say During the Presentation, What to Do During the Presentation

RELATED MATERIALS

Content
See *Practical Selling*, available from EIMC-Educational Resources.

Instructional Planner for Chapter 16, Handling Customer Questions and Objections

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(B) demonstrate the ability to assist a customer in making a good buying decision

Comments
This is one of six chapters (12-17) that cover the selling process in detail. They do not address the last two subelements of element (9), which involve merchandising and promotion and are covered elsewhere in the text.

INDICATORS OF CHAPTER CONTENT

Words to Know
objection, excuse, objections analysis sheet, paraphrase, "yes, but" method, boomerang method, question method, superior point method, direct denial method, demonstration method, third-party method

Subheads in Chapter

Objections vs. Excuses—Welcome Objections, Plan Ahead for Objections, Common Objections, Four-Step Process for Handling Objections, Specialized Methods of Handling Objections

RELATED MATERIALS

Content
See *Practical Selling*, available from EIMC-Educational Resources.

Academic Skills
In *Balancing the Curriculum for Marketing Education*, see Activity 16: Use Information to Answer Customer's Questions.

Instructional Planner for Chapter 17, Closing the Sale and Follow-up

ME-I. (b)(9)(B) demonstrate the ability to assist a customer in making a good buying decision

Comments
This is one of six chapters (12-17) that cover the selling process in thorough detail. They do not address the last two subelements of element (9), which involve merchandising and promotion and are covered elsewhere in the text.

INDICATORS OF CHAPTER CONTENT

Words to Know
closing the sale, buying signals, trial close, which close, standing room only close, assumption close, direct close, service close, suggestion selling, related merchandise

Subheads in Chapter

Closing the Sale—Timing the Close, Buying Signals, Trial Close, General Rules for Closing the Sale, Specialized Methods for Closing the Sale, Failure to Close the Sale
Suggestion Selling—Benefits of Suggestion Selling, Rules for Suggestion Selling, Items Used in Suggestion Selling
After-Sale Activities—Taking Payment or Taking the Order, Departure, Follow-up, Evaluation

Instructional Planner for Chapter 18, Recording Sales

ME-I. (b)(11)(C) demonstrate proficiency in cashiering and cash register operations

Comments
This topic is related to mathematics and content in Chapter 28: Marketing Math Applications. The other essential elements for marketing mathematics are cited for that chapter later. *Mathematics: Essential to Marketing* also has content and math applications which cashiers should know.

INDICATORS OF CHAPTER CONTENT

Words to Know
sales transaction, UPC, UVM, till, opening change fund, cash sale, floor limit, discount sale, layaway, on-approval sale, COD, return, exchange, allowance

Subheads in Chapter

Recording Sales in Different Sales Situations
Cash Registers
Electronic Cash Registers—Manual Key Entry, Electronic Wand Entry, Optical Scanning
Cash Drawer Operations —Cash Drawer Arrangement, Verify Opening Change Fund, Check for Adequate Change, Making Change, Balancing Cash, Safeguards against Theft
Sales Slips
Types of Sales Transactions

RELATED MATERIALS

Content
EIMC-Educational Resources materials in this topical area include *Mathematics: Essential to Marketing* and *Making Basic Math Skills Work for You in Marketing*. Two of the individualized manuals directed at specific training stations, *Supermarket Customer Service* and *Home Improvement Center Retailing*, also have content on cashiering. A course outline from EIMC-Educational Resources titled *Checking and Cashiering* covers the topic in more detail. Also available is a seven-tape videotape series titled the *Checking and Cashiering Series*, developed for the food marketing industry.

Academic Skills
In *Balancing the Curriculum for Marketing Education*, see Activity 46: Demonstrate Proficiency in Cashiering.

Instructional Planner for Chapter 19, What Is Promotion?

ME-I. (b)(2)(C) learn how marketing is organized by its functions
(b)(9) Merchandising, selling and service
(b)((9)(D) understand the use of promotion for preselling

Comments
Chapters 19-23 discuss the promotion function of marketing, so they address the same essential elements. Merchandising, as defined, covers buying and selling as well as attracting the customer—the activities of promotion. There are other chapters in the text and other related materials to deal with the buying and selling aspects of merchandising.

Chapter 19 is one of several chapters in the text which address the functions of marketing. The planner for (b)(2)(C) is based on an older organizational plan for the functions of marketing, but some of the terms are still used as functions in the text. The newest list of functions on which Marketing Education curricula are likely to be based is that shown on the dividers of the text, with nine functions.

INDICATORS OF CHAPTER CONTENT

Words to Know
promotion, advertising, publicity, image, sales promotion, premiums, contests, sweepstakes, rebate, product sample, promotional mix, brand, generic products

Subheads in Chapter

The Role of Promotion
Types of Promotion—Advertising, Publicity, Sales Promotion, Personal Selling
The Concept of Promotional Mix
Brands

RELATED MATERIALS

Special Needs Adaptations
Overheads and Handouts for Marketing Education contains the following master:

(b)(9)(D) Activities for the Promotion Function

Instructional Planner for Chapter 20, Advertising Media

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(D) understand the use of promotion for preselling

Comments
Chapters 19-23 discuss the promotion function of marketing, so they address the same essential elements. Merchandising, as defined, covers buying and selling as well as attract the customer—the activities of promotion. There are other chapters in the text and other related materials to deal with the buying and selling aspects of merchandising.

INDICATORS OF CHAPTER CONTENT

Words to Know
promotional advertising, institutional advertising, media, print media, broadcast media, specialty media, milline rate, network radio advertising, national spot radio advertising, local radio advertising

Subheads in Chapter

Advertising and Its Purpose
Types of Media—Print Media, Broadcast Media, Specialty Media, Other Advertising Media
Media Costs—Newspaper Rates, Magazine Rates, Radio Rates, Television Rates
Selection of Promotional Media

RELATED MATERIALS

Content
EIMC-Educational Resources materials in this functional area of marketing include assignments in *General Merchandising* (2nd ed.) and in various individualized manuals correlated to specific training stations. These are cited later for specific chapters in the text. They are for students whose training stations involve duties in the activities of promotion. For that reason, the teacher may find certain students to be useful sources of information at the time this chapter is presented to the class. The manuals also have greater coverage of each topic and can be used by the teacher as sources of additional information. The manual related to this chapter is *Advertising Basics and Careers.*

Higher Level Thinking Skills
In *Higher Level Thinking in Marketing Education*, see Activity 21: Goals of Advertising.

Instructional Planner for Chapter 21, Preparing Written Advertisements

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(D) understand the use of promotion for preselling

Comments
Chapters 19-23 discuss the promotion function of marketing, so they address the same essential elements. Merchandising, as defined, covers buying and selling as well as attracting the customer—the activities of promotion. There are other chapters in the text and other related materials to deal with the buying and selling aspects of merchandising.

INDICATORS OF CHAPTER CONTENT

Words to Know
advertising agencies, cooperative advertising, headline, copy, illustration, signature, clip art, ad layout, advertising proof

Subheads in Chapter

The Advertising Agency
Cooperative Advertising
Parts of a Print Advertisement—Headline, Copy, Illustration, Signature
Developing Advertising Headlines
Preparing Advertising Copy
Selecting Advertising Illustrations
Developing Advertising Layouts—Using Color in Print Advertisements, Selecting Typefaces and Type Sizes for Print Advertisements, Checking Advertising Proofs

RELATED MATERIALS

Content
EIMC-Educational Resources materials in this functional area of marketing include assignments in *General Merchandising* (2nd ed.) and in various individualized manuals correlated to specific training stations. These are cited later for specific chapters in the text, as well as for appropriate essential elements. They are for students whose training stations involve duties in the activities of promotion. For that reason, the teacher may find certain students to be useful sources of information at the time this chapter is presented to the class. The manuals also have greater coverage of each topic and can be used by the teacher as sources of additional information.

Useful manuals for this chapter include *Advertising Basics and Careers* and *Color Fundamentals of Marketing*.

Instructional Planner for Chapter 22, Visual Merchandising and Display

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(D) understand the use of promotion for preselling

Comments
Chapters 19-23 discuss the promotion function of marketing, so they address the same essential elements. Merchandising, as defined, covers buying and selling as well as attracting the customer—the activities of promotion. There are other chapters in the text and other related materials to deal with the buying and selling aspects of merchandising.

INDICATORS OF CHAPTER CONTENT

Words to Know
visual merchandising, display, storefront, marquee, store layout, fixtures, complementary colors, adjacent colors, proportion, formal balance, informal balance

Subheads in Chapter

What Is Visual Merchandising?
Elements of Visual Merchandising—Storefront, Store Layout, Store Interior, Interior Displays
Display Design and Preparation—Selecting Merchandise for Display, Choosing a Setting Type, Using Fixtures, Display Props, Manipulating Artistic Elements
Display Maintenance
Dismantling Procedures for Displays

RELATED MATERIALS

Content
EIMC-Educational Resources materials in this functional area of marketing include assignments in *General Merchandising* (2nd ed.) and in various individualized manuals correlated to specific training stations. These are cited later for specific chapters in the text, as well as for appropriate essential elements. They are for students whose training stations involve duties in the activities of promotion. For that reason, the teacher may find certain students to be useful sources of information at the time this chapter is presented to the class. The manuals also have greater coverage of each topic and can be used by the teacher as sources of additional information. Specifically useful EIMC manuals for this chapter include *Basic Visual Merchandising* (2nd ed.) and *Color Fundamentals of Marketing*.

Higher Level Thinking Skills
In *Higher Level Thinking in Marketing Education*, see Activity 20: Goals of Advertising.

Instructional Planner for Chapter 23, Publicity and Public Relations

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(D) understand the use of promotion for preselling

Comments
Chapters 19-23 discuss the promotion function of marketing, so they address the same essential elements. Merchandising, as defined, covers buying and selling as well as attracting the customer—the activities of promotion. There are other chapters in the text and other related materials to deal with the buying and selling aspects of merchandising.

INDICATORS OF CHAPTER CONTENT

Words to Know
public relations, customer advisory boards, consumer affairs specialists, community relations, news release

Subheads in Chapter

Elements of Public Relations—Employee Relations, Customer Relations, Community Relations, Publicity
What Public Relations Specialists Do
Public Relations in the Promotional Mix

RELATED MATERIALS

Content
EIMC-Educational Resources materials in this functional area of marketing include assignments in *General Merchandising* (2nd ed.) and in various individualized manuals correlated to specific training stations. These are cited later for specific chapters in the text, as well as for appropriate essential elements. They are for students whose training stations involve duties in the activities of promotion. For that reason, the teacher may find certain students to be useful sources of information at the time this chapter is presented to the class. The manuals also have greater coverage of each topic and can be used by the teacher as sources of additional information. *General Merchandising* (2nd ed.) explains how public relations fits into the overall promotion picture.

Instructional Planner for Chapter 24, Physical Distribution

ME-I. (b)(2) Basic marketing functions
(b)(2)(C) learn how marketing is organized by its functions

Comments
As placed in the text and in the recommended scope and sequence, Chapter 24 is used as an introduction to receiving, checking, and marking merchandise and inventory control. It does not fit a subelement in that context but does fit the one above.

Chapter 24 is one of several chapters in the text which address the functions of marketing. The newest list of functions on which Marketing Education curricula are likely to be based is that shown on the dividers of the text, with nine functions.

INDICATORS OF CHAPTER CONTENT

Words to Know
physical distribution, transporting function, common carrier, contract carrier, exempt carrier, private carrier, ten-mile, carload, parcel post, private parcel carrier, express carrier, storage function

Subheads in Chapter

The Scope of Physical Distribution
The Transporting Function—Motor Carriers, Railroads, Waterways, Pipelines, Air Carriers
Transportation Service Companies—Government Parcel Post, Private Parcel Carriers, Express Carriers
The Storage Function—Private Warehouses, Public Warehouses, Distribution Centers

RELATED MATERIALS

Content
EIMC-Educational Resources materials in this functional area of marketing include the new *Physical Distribution* (rev. ed.) which also covers topics in Chapters 25 and 26 of the text.

Instructional Planner for Chapter 25, Receiving, Checking, and Shipping Merchandise

ME-I. (b)(2)(C) learn how marketing is organized by its functions
(b)(8) Inventory control systems
(b)(8)(b) check incoming stock and complete stock control records

Comments

Together, Chapters 25 and 26 address the two essential elements of (b)(8) Inventory control systems. See also essential elements listed for each chapter.

INDICATORS OF CHAPTER CONTENT

Words to Know

dock, invoice, receiving control, apron, blind check method, direct check method, dummy invoice check method, spot check method, preretailing marking method, source marking

Subheads in Chapter

Shipping Arrangements
Receiving Merchandise—Invoices, Receiving Records, Check-in Procedures, Returning Merchandise, Accounting for Merchandise
Marking Merchandise—Importance of Price Marking, Transferring Merchandise

RELATED MATERIALS

Content

EIMC-Educational Resources materials for this essential element include the new *Physical Distribution* (rev. ed.), *General Merchandising* (2nd ed.), and *Mathematics: Essential to Marketing*.

Academic Skills

In *Balancing the Curriculum for Marketing Education,* see Activity 12: Compute Rates and Charges, which contains a problem related to interpreting an invoice to determine real cost of merchandise.

Special Needs Adaptations

Overheads and Handouts for Marketing Education contains the following master:

(b)(8)(B) Activities in the Receiving Operation

Instructional Planner for Chapter 26, Stock and Inventory Control

ME-I. (b)(2)(C)	learn how marketing is organized by its functions
(b)(3)(C)	complete required business forms and records
(b)(7)(B)	develop an awareness of specific applications of computers in marketing
(b)(8) Inventory control systems	
(b)(8)(A)	understand various inventory systems
(b)(11)(A)	understand and apply markup, apply markup, markdown, and stockturn

Comments

Together, Chapters 25 and 26 address the two essential elements of (b)(8) Inventory control systems. The other elements are also addressed.

INDICATORS OF CHAPTER CONTENT

Words to Know

merchandise assortment, basic stock list, model stock list, stock turnover, dollar control, unit control, physical inventory system, stock shortage, shrinkage, perpetual inventory system

Subheads in Chapter

Merchandise Assortment
The Nature of Inventory Control Systems—Inventory Management, Stock Turnover, Dollar Control and Unit Control
Types of Unit Control Systems—Physical Inventory Systems, Perpetual Inventory System, The Impact of Computers on Inventory Management

RELATED MATERIALS

Content

EIMC-Educational Resources materials include the following: *Physical Distribution (*2nd ed.), *General Merchandising (*2nd ed.), and *Mathematics: Essential to Marketing*.

Academic Skills

In *Balancing the Curriculum for Marketing Education,* see Activity 28: Identify and Complete Required Forms and Records; and Activity 39: Understand and Apply Stockturn. Other possible activities are Activity 33: Demonstrate the Card System Inventory; Activity 34: Understand the Mechanical System of Inventory; Activity 35: Demonstrate the Operation of an Inventory Control Locator System; Activity 36: Introduce and Understand the Advantages of a Computerized Inventory System.

Special Needs Adaptations

Overheads and Handouts for Marketing Education contains the following masters:

(b)(8)(A) Two Types of Inventory Control Systems, (b)(7)(B) Computer-Based Marking Systems, (b)(3)(C) Types of Transaction Facts, and (b)(11)(A) Calculating Stockturn

Instructional Planner for Chapter 27, Risk Management

ME-I. (b)(2) Basic marketing functions
(b)(2)(C) learn how marketing is organized by its functions
(b)(4)(B) identify internal and external security procedures

Comments

Chapter 27 is one of several chapters in the text which address the functions of marketing. The newest list of functions on which Marketing Education curricula are likely to be based is that shown on the dividers of the text, with nine functions.

Risk management is likely to be of most interest to top management and entrepreneurs, so the teacher wishing to cover this topic in greater detail should consult information for Marketing Education II, Entrepreneurship, and Principles of Management.

INDICATORS OF CHAPTER CONTENT

Words to Know

business risk, economic risks, natural risks, human risks, insurance policy, extended coverage, coinsurance policy, fidelity bonds, performance bonds

Subheads in Chapter

Kinds of Risks—Economic Risks, Natural Risks, Human Risks
Handling Business Risks—Risk Prevention and Control, Risk Transfer, Transferring Risks through Business Ownership, Risk Retention, Risk Avoidance

RELATED MATERIALS

Content

Curriculum guides and texts for the courses Marketing Education II, Entrepreneurship, and Principles of Marketing may have additional information on risk management.

Higher Level Thinking Skills

In *Higher Level Thinking in Marketing Education,* see Activity 24: DECA Creed—Reducing the Human Risk Factor.

Special Needs Adaptations

Overheads and Handouts for Marketing Education contains the following master:

(b)(4)(B) Store Losses

Instructional Planner for Chapter 28, Marketing Math Applications

ME-I. (b)(11) Marketing mathematics

(b)(11)(B) demonstrate ability to calculate profit, loss, *payroll*, *invoices*, *taxes*, *interest*, *sales slips*, *credit card purchases*, and *purchase orders*

Comments

The italicized terms indicate Marketing Education I elements or related information covered in Chapter 28, essential element instructional planners, and *Mathematics: Essential to Marketing*. According to the recommended scope and sequence, the content of this chapter should be taught by subtopics, as they relate to specific other content in the course.

INDICATORS OF CHAPTER CONTENT

Words to Know

gross sales, net sale, principal, interest, simple interest, compound interest, rate of interest

CHAPTER SUBHEADS AND RELATED MATERIALS

Subheads in Chapter	***Mathematics: Essential to Marketing***
Purchase Orders (page 297)	Assignment 25
Invoices (page 298)	Assignments 14-16
Sales Checks (pages 299-300)	Asssignment 9
Discounts (pages 300-302)—Cash Discounts, Trade Discounts, Quantity Discounts, Seasonal Discounts, Promotional Discounts	Assignments 10, 14, 16
Sales Tax (page 302)	Assignment 9
Calculating Shipping Charges (pages 302-304)	
Credit Card Sales (page 305)	Assignment 9
Returns, Exchanges, and Allowances (pages 306-307)	Assignment 9
Calculating Gross Sales and Net Sales (page 307)	Assignment 30
Profit and Loss (pages 307-308)	Assignments 28, 30
Interest (page 308-309)	Assignments 4, 5
Payroll (pages 309-313)	Assignments 17-19

Higher Level Thinking Skills

In *Higher Level Thinking in Marketing Education,* see Activity 8: Who Needs to Know, which is based on facts on a sales check.

Special Needs Adaptations

Overheads and Handouts for Marketing Education contains the following master:

(b)(11)(B) Employee Compensation

Instructional Planner for Chapter 29, Price Planning

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(C) demonstrate the ability to merchandise products and services properly

Comments

As shown on the divider in the text, Chapter 29 is the first of three chapters on the pricing aspect of merchandising, which in retailing includes the buying and selling of goods. Merchandising products and services properly includes setting the right price. Chapter 29, Price Planning, and Chapter 30, Pricing Strategies, provide much more detail on these topics than is indicated in the previous curriculum guide, so the (b)(9)(C) instructional planner has been modified accordingly. Its original content dealt more with selection of merchandise.

INDICATORS OF CHAPTER CONTENT

Words to Know
price, price guarantee, break-even point, price fixing, price discrimination, loss leader, unit pricing

Subheads in Chapter

What Is Price?—The Role of Product, Various Forms of Price, Importance of Price
Factors Affecting Price—Supply and Demand, Consumers, Channel Members, Competition, Costs and Expenses, Government Regulations
Goals of Pricing—Share of the Market, Return on Investment, Meeting Competition

RELATED MATERIALS

Content
Mathematics: Essential to Marketing contains six assignments on purchasing and pricing, in Unit VIII: Purchasing Merchandise; and Unit IX: Finding Retail Price. The one most related to this chapter is Assignment 29: Break-Even Point. It explains that concept in considerable detail, but may be a bit advanced because of the math involved. The teacher may also find useful concepts and explanations in Assignment 28: Margins and Profits. However, it also has math, which is addressed later in the text.

Higher Level Thinking Skills
In *Higher Level Thinking in Marketing Education*, see Activity 16: Comparative Price Survey.

Special Needs Adaptations
Overheads and Handouts for Marketing Education contains the following master:

(b)(9)(C) The Price Is Right If...

Instructional Planner for Chapter 30, Pricing Strategies

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(C) demonstrate the ability to merchandise products and services properly

Comments

As shown on the divider in the text, Chapter 30 is the second of three chapters on the pricing aspect of merchandising, which in retailing includes the buying and selling of goods. Merchandising products and services properly includes setting the right price. Chapter 29, Price Planning, and Chapter 30, Pricing Strategies, provide much more detail on these topics than is indicated in the previous curriculum guide, so the (b)(9)(C) instructional planner has been modified accordingly. Its original content dealt more with selection of merchandise

INDICATORS OF CHAPTER CONTENT

Words to Know
markup, cost-plus pricing, skimming pricing, penetration pricing, one-price policy, flexible-price policy, and price lining

Subheads in Chapter

Basic Pricing Strategies—Cost-Oriented Pricing, Demand-Oriented Pricing, Competition-Oriented Pricing, Combined Pricing Strategies
Influences of Wholesalers and Retailers
Pricing and Product Life Cycles—New Product Introduction, Other Product Stages
One-Price vs. Flexible-Price Policy
Pricing Techniques—Psychological Pricing, Discount Pricing
Steps in Setting Price—Determine Pricing Objectives, Study Costs, Estimate Demand, Study Competition, Decide on Pricing Strategy

RELATED MATERIALS

Content
Mathematics: Essential to Marketing contains six assignments on purchasing and pricing. The one most directly related to chapter content is Assignment 26: Pricing Structures.

Special Needs Adaptations
Overheads and Handouts for Marketing Education contains the following masters:

(b)(9)(C) 2. The Price is Right If. . .
(b)(9)(C) 5. Some Pricing Terms

Instructional Planner for Chapter 31, Pricing Math

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(C) demonstrate the ability to merchandise products and services properly
(b)(11)(A) understand and apply markup, markdown, and stockturn

Comments

Chapter 31 is the third of three chapters on the pricing aspect of merchandising, which in retailing includes the buying and selling of goods. Merchandising products and services properly includes setting the right price. Chapter 31 also discusses the mathematics involved in pricing.

INDICATORS OF CHAPTER CONTENT

Words to Know

gross profit, maintained markup

Subheads in Chapter

Profit vs. Markup
Basic Markup Calculations—Percentage Markup, Markup Equivalents Table, Cost Method of Pricing, Retail Method of Pricing, Markdowns, Maintained Markup
Unit Selling Prices
Discounts—Employee Discounts, Discounts from Manufacturers
Sales Tax and Prices

RELATED MATERIALS

Content

Mathematics: Essential to Marketing has six assignments on purchasing and pricing: The most pertinent here are Assignment 27: Markup; and Assignment 28: Margins and Profits. Other useful assignments are Assignment 10: Employee and Other Retail Discounts; and Assignment 14: Cash Discounts.

Higher Level Thinking Skills

In *Higher Level Thinking in Marketing Education*, see Activity 17: Discounts and Incentives.

Academic Skills

In *Balancing the Curriculum for Marketing Education*, see Activity 37 and Activity 38, which relate to this information to mathematical skills.

Special Needs Adaptations

Overheads and Handouts for Marketing Education contains these masters:

(b)(11)(A) 1. Basic Markdown Formulas
2. Basic Markup Formulas
3. Figuring Prices
4. Markup Percentages
5. Figuring Markups for Customers
6. Figuring Markdowns for Retailers

Instructional Planner for Chapter 32, Buying

ME-I. (b)(9) Merchandising, selling and service
(b)(9)(C) demonstrate the ability to merchandise products and services properly

Comments
Chapter 32 is about the purchasing function of marketing. However, it covers the subject in more detail than the previous curriculum guide for Marketing Education I. The content of the chapter is closer to meeting essential elements for Marketing Education II. Chapter 32 also includes some purchasing mathematics that are not covered by Marketing Education I essential elements.

INDICATORS OF CHAPTER CONTENT

Words to Know
purchasing agent, wholesale buyer, retail buyer, resident buying office, advance dating, extra dating, end-of-month (EOM) dating, receipt-of-goods (ROG) dating, consignment buying, memorandum buying, open-to-buy (OTB)

Subheads in Chapter

Types of Buyers
Buying Strategies
Steps in the Buying Process—Step One: Determining Needs, Step Two: Identifying and Selecting Sources, Step Three: Placing the Order, Step Four: Obtaining Feedback and Evaluating Purchases
Marketing Mathematics Related to Retail Buying—Planned Sales, Beginning-of-the-Month (BOM) Stock, Planned Reductions, Planned Purchases

RELATED MATERIALS

Content
Mathematics: Essential to Marketing contains these assignments to cover marketing math for the buying function:

Assignment 22: Stock/Sales Ratio
Assignment 23: Open-to-Buy
Assignment 24: The Merchandise Plan
Assignment 25: Purchase Orders

Higher Level Thinking Skills
In *Higher Level Thinking in Marketing Education*, see Activity 22: The Changing American Society; and Assignment 23: Effective Buying in the Year 2000.

Special Needs Adaptations
Overheads and Handouts for Marketing Education contains these masters:

(b)(9)(C) 1. The "Rights" of Merchandising
3. Merchandise Plan for Borland's Books
4. Merchandise Plan

Instructional Planner for Chapter 33, What Is Marketing Research?

ME-I. (b)(2)(C) learn how marketing is organized by its functions
(b)(9) Merchandising, selling and service
(b)(9)(C) demonstrate the ability to merchandise products and services properly

Comments

The subject of marketing research relates more directly to essential elements for Marketing Education II. As placed in the recommended scope and sequence for Marketing Education I, Chapter 33 helps to emphasize the concept of marketing as meeting identified needs of potential customers.

INDICATORS OF CHAPTER CONTENT

Words to Know

marketing research, advertising research, business research, operations research, corporate responsibility research, product research, sales and market research, test marketing

Subheads in Chapter

What Is Marketing Research?
Who Uses Marketing Research?
Nature and Scope of Marketing Research—Advertising Research, Business Research, Operations Research, Corporate Responsibility Research, Product Research, Sales and Market Research

RELATED MATERIALS

Content

Advertising Basics and Careers, an individualized instruction publication for students in related co-op jobs, includes information on marketing research as it relates to advertising. It is part of the individualized series from EIMC-Educational Resources.

Higher Level Thinking Skills

In *Higher Level Thinking in Marketing Education*, see Activity 18: Creating a Business; and Activity 19: Marketing Research.

Instructional Planner for Chapter 34, Conducting Marketing Research

This chapter is excluded from this curriculum guide as being too advanced and inappropriate.

Instructional Planner for Chapter 35, What Is Product Planning?

ME-I. (b)(2)(C) learn how marketing is organized by its functions

Comments
As shown by the divider in the text, this chapter is related to the function of Product/Service Planning. Therefore, it is correlated to that element from Marketing Education I. However, it may be more appropriate for advanced courses or for the Principles of Marketing cluster course.

INDICATORS OF CHAPTER CONTENT

Words to Know
product planning, tangible product features, extended product features, generic product features, consumer goods, convenience goods, staples, impulse items, emergency goods, shopping goods, specialty goods, industrial goods

Subheads in Chapter

Nature and Scope of Product Planning—Product Features, Steps in Product Planning
Product Selection—Consumer Goods, Consumer Services, Industrial Goods, Industrial Services

Instructional Planner for Chapter 36, Branding, Packaging, and Labeling

ME-I. (b)(2)(C) learn how marketing is organized by its functions

Comments:
As shown by the divider in the text, this chapter is related to the function of Product/Service Planning. Therefore, it is correlated to that element from Marketing Education-I. However, it may be more appropriate for advanced courses or for the Principles of Marketing cluster course.

INDICATORS OF CHAPTER CONTENT

Words to Know
product mix, product line, product item, product width, product depth, mixed-brand strategy, package, label

Subheads in Chapter

Product Mix—Product Lines and Items, Product Width and Depth
Branding—Role of Brands in Product Planning, Branding Strategy
Packaging and Its Functions - Promoting and Selling the Product, Defining Product Identity, Providing Information, Meeting Customer Needs, Ensuring Safe Use, Protecting the Product
Labeling

Instructional Planner for Chapter 37, Extended Product Features

ME-I. (b)(2)(C) learn how marketing is organized by its functions

Comments
As shown by the divider in the text, this chapter is related to the function of Product/Service Planning. Therefore, it is correlated to that element from Marketing Education I. However, it may be more appropriate for advanced courses or for the Principles of Marketing cluster course.

INDICATORS OF CHAPTER CONTENT

Words to Know
warranty, express warranty, full warranty, limited warranty, implied warranty, warranty of merchantability, warranty of fitness for a specific purpose, disclaimer, extended service contracts, lemon laws

Subheads in Chapter

Warranties—Express Warranties, Implied Warranties, Warranty Disclaimers, Role of Warranties in Product Planning
Other Extended Product Features
Consumer Laws and Agencies—Federal Statutes, State Statutes
Consumer Remedies and Responsibilities—Product Liability Suits, Consumer Responsibilities

Instructional Planner for Chapter 38, What Is Entrepreneurship?

ME-I. (b)(6)(C) understand the types of business ownership
(b)(6)(D) identify the role of the entrepreneur in a free enterprise system
(b)(12)(A) identify employment opportunities and preparation requirements in chosen fields
(b)(2)(C) learn how marketing is organized by its functions

Comments

Chapter 38 is most closely related to the first three elements above. In addition, it concerns the marketing functions of financing and risk management. The chapter is also related to elements in Marketing Education II and Entrepreneurship.

INDICATORS OF CHAPTER CONTENT

Words to Know

entrepreneurship, entrepreneurs, franchise, sole proprietorship, partnership, corporation, stockholders, business plan

Subheads in Chapter

What Is Entrepreneurship?—The Risk of Entrepreneurship, Advantages of Entrepreneurship, Disadvantages of Entrepreneurship
Characteristics of a Successful Entrepreneur—Do You Have What It Takes?
The Importance of Entrepreneurship in Our Economy
Ways to Enter Business—Purchasing an Existing Franchise Business, Purchasing an Existing Non-Franchise Business, Taking Over the Family Business
Forms of Business Organization—The Sole Proprietorship, The Partnership, The Corporation
Developing the Business Plan—Description and Analysis of the Business Situation, Organization and Marketing Plan, Financial Plan

RELATED MATERIALS

Content

See *Curriculum Guide for Entrepreneurship*, available from EIMC-Educational Resources.

Higher Level Thinking Skills

In *Higher Level Thinking in Marketing Education*, see Activity 7: Interviewing an Entrepreneur.

Academic Skills

In *Balancing the Curriculum for Marketing Education*, see Activity 37: Identify Types of Business Ownership.

Special Needs Adaptations

Overheads and Handouts for Marketing Education contains this master:

(b)(6)(D) The Entrepreneurship Decision

Instructional Planner for Chapter 39, Describing and Analyzing a Proposed Business; Chapter 40, Organizing and Marketing a Proposed Business; and Chapter 41, Financing a Proposed Business

These chapters are more closely related to Marketing Education II and the Entrepreneurship course, so they are not covered in this guide.

Instructional Planner for Chapter 42, Careers in Marketing

ME-I. (b)(12)(A) identify employment opportunities and preparation requirements in chosen fields
(b)(16) Develop concepts and skills relevant to the specific occupational objectives of students

Comments

This chapter is the first of four related chapters on careers in marketing. They are Chapter 42, Careers in Marketing; Chapter 43, Self Assessment and Career Research; Chapter 44, Career Decision-Making; and Chapter 45, Employability Skills.

In addition to these chapters, students should have access to those EIMC-Educational Resources individualized manuals which address specific jobs in more detail. They are necessary for essential element (b)(16).

INDICATORS OF CHAPTER CONTENT

Words to Know

management training programs, Associate of Arts (A.A.), Bachelor of Arts (B.A.), Bachelor of Science (B.S.), Bachelor of Education (B.Ed.), fringe benefits

Subheads in Chapter

Employment Trends
An Overview of Marketing Careers—Educational Requirements, Career Specialties
Benefits of a Marketing Career—Rapid Advancement

RELATED MATERIALS

Content

The EIMC-Educational Resources series of individualized publications for students with co-op training stations includes these most recent additions. They are especially useful because each manual is correlated to a training plan for a co-op job.

Advertising Basics and Careers
Basic Visual Merchandising, 2nd ed.
General Merchandising, 2nd ed.
Marketing Fibers and Fabrics: Facts for Career Personnel
Men's Fashion Merchandising
Supermarket Customer Service
Supermarket Special Departments
Apparel Marketing
Food Service Management, 2nd ed.
Home Improvement Center Retailing
Physical Distribution, 2nd ed.
Supermarket Merchandising
Tourism and Hospitality Marketing

Other career-specific manuals (for which there are only answer books) include

Automotive Parts Clerk
Business and Personal Services Marketing
Basic Retail Credit
Color Fundamentals of Marketing

Convenience Store Operations
Fashion Fundamentals
Financial Services Marketing
Furniture for the Home
Home Entertainment Equipment
Hotel/Motel Operations
Petroleum Marketing
Physical Distribution
Selling Home Appliances
Sporting Goods: Active Sportswear and Equipment
Sporting Goods: Fishing and Hunting Equipment
Drugstore Merchandising
Fast Food Marketing
Food Service Marketing
Hardware Selling
Home Furnishings Marketing
Industrial Marketing
Photographer
Practical Selling
Retail Travel Marketing
Shoe Sales and Merchandising
Wholesale Marketing
Women's Fashion Merchandising

Also useful is *Career Planning in the Private Enterprise System.*

Instructional Planner for Chapter 43, Self-Assessment and Career Research

ME-I. (b)(12(A) identify employment opportunities and preparation requirements in chosen fields

Comments

This chapter is the second of four related chapters on careers in marketing. They are Chapter 42, Careers in Marketing; Chapter 43, Self Assessment and Career Research; Chapter 44, Career Decision-Making; and Chapter 45, Employability Skills.

In addition to these chapters, students should have access to the EIMC-Educational Resources individualized manuals which address specific jobs in more detail.

INDICATORS OF CHAPTER CONTENT

Words to Know

values, life-style goals, aptitude, *Dictionary of Occupational Titles* (DOT), career outlook, *Occupational Outlook Handbook* (OOH), *Guide for Occupational Education* (GOE), career consultation

Subheads in Chapter

Self-Assessment—Your Values, Your Life-Style Goals, Your Interests
Your Skills and Aptitudes—Your Personality, Your Work Environment, Your Relationship Preferences
Career Assessment—Work Values, Life-Style Fit, Salaries and Benefits, Career Outlook, Education and Training, Duties and Responsibilities, Skills and Aptitudes Required, Helpful Personality Traits, Work Environment, Work Relationships
Research Resources—Libraries, The Community

RELATED MATERIALS

Content

For EIMC-Educational Resources manuals related to specific job placements and careers, see content listing for Chapter 42, Careers in Marketing.

Academic Skill

In *Balancing the Curriculum for Marketing Education,* see Activity 22: Investigate a Company for Job Information.

Instructional Planner for Chapter 44, Career Decision Making

ME-I. (b)(12)(A) identify employment opportunities and preparation requirements in chosen fields
(b)(12)(B) identify effective ways to secure and terminate employment

Comments
This chapter is the third of four related chapters on careers in marketing. They are Chapter 42, Careers in Marketing; Chapter 43, Self Assessment and Career Research; Chapter 44, Career Decision-Making; and Chapter 45, Employability Skills.

INDICATORS OF CHAPTER CONTENT

Words to Know
personal career profile, planning goals, specific goal, realistic goal, area vocational schools, area vocational centers, technical institutes

Subheads in Chapter

Evaluating Your Choices
Making Your Decision
Developing a Plan of Action—Formulating Planning Goals, Fulfilling Educational Requirements
Choosing the Best Education for You
Outlining Your Plan

RELATED MATERIALS

Content
For EIMC-Educational Resources manuals related to specific job placements and careers, see content listing for Chapter 42, Careers in Marketing.

Academic Skills
In *Balancing the Curriculum for Marketing Education,* see Activity 23: Develop a Career Plan.

Instructional Planner for Chapter 45, Employability Skills

ME-I.	(b)(12)(A)	identify employment opportunities and preparation requirements in chosen fields
	(b)(12)(B)	identify effective ways to secure and terminate employment
	(b)(12)(C)	demonstrate effective communication skills both oral and written (and follow through on assigned tasks)
	(b)(15)(A)	demonstrate proficiency in oral and written business communications
	(b)(15)(B)	identify forms of business communication
	(b)(15)(C)	demonstrate proficiency in using listening skills
	(b)(15)(D)	recognize the dynamics of nonverbal communications

Comments

This chapter is the last of four related chapters on careers in marketing. They are Chapter 42, Careers in Marketing; Chapter 43, Self Assessment and Career Research; Chapter 44, Career Decision-Making; and Chapter 45, Employability Skills. The first two elements above are specifically on obtaining a job. In addition, this is a good instructional opportunity for reinforcing skills in communication, which may also be addressed at other points in the course. The chapter specifically calls for use of communication skills. In addition to these chapters, students should have access to those EIMC-Educational Resources individualized manuals which address specific jobs in more detail, often including information on communication skills required.

INDICATORS OF CHAPTER CONTENT

Words to Know

job lead, public employment agencies, private employment agencies, direct calling, standard English, references, resume, cover letter

Subheads in Chapter

Getting a Work Permit
Finding Job Openings—Exploring Sources of Job Leads, Expanding Your List of Job Leads
Applying for a Job—Using Standard English, Filling Our Application Forms, Writing Letters of Application, Preparing Resumes
Interviewing for a Job—Conducting Yourself Properly During an Interview, Following Up an Interview

RELATED MATERIALS

Content

EIMC-Educational Resources materials include *Communication for Marketing*, which covers both theories and practicalities of communication.

Academic Skills

In *Balancing the Curriculum for Marketing Education*, see Activity 24: Practice Job-Seeking Skills.

Planners Based on Assignments in *Preparing to Succeed in Marketing*

Instructional Planner for Assignment 1: Staying Healthy: The Role of Diet, Exercise, and Fitness

ME-I. (b)(13)(A) understand importance of maintaining good health and proper appearance for effective job performance

(b)(13)(B) understand oneself and others

Summary of Content

Taking the steps to ensure that you stay healthy not only provides the personal benefits of feeling good about yourself, but also makes you a more valuable employee. Feeling good translates to additional energy that you can direct toward your work. You are much more likely to reach your potential if you feel well. Employers are also conscious about reduced staff productivity as a result of sick time. Developing healthy habits as a result of sleeping, exercising, and eating properly means that you will be there every day to help your employer get the job done.

Instructional Planner for Assignment 2: Staying Clean and Maintaining Your Teeth

ME-I. (b)(13)(A) understand importance of maintaining good health and proper appearance for effective job performance

(b)(13)(B) understand oneself and others

Summary of Content

Good grooming starts with a wholesome, healthy physical appearance. This includes a clean body and well cared for teeth. Cleanliness is one of the most important parts of good grooming. Cleaning your body and maintaining good dental hygiene are the first steps to good grooming. You should bathe daily to remove dirt, perspiration, pollution, and bacteria that collect on your body every day. In addition, brushing your teeth should be worked into your routine at least twice a day.

Instructional Planner for Assignment 3: Grooming Your Skin, Hair, and Hands

ME-I.	(b)(13)(A)	understand importance of maintaining good health and proper appearance for effective job performance
	(b)(13)(B)	understand oneself and others

Summary of Content

In addition to cleanliness, good grooming means that special attention is paid to your skin, hair, and hands. Healthy looking skin and hair make you look attractive and well groomed. Maintaining this look requires some work. But considering that your effort will pay off in the way that you look, the work will be well worth the time and energy invested.

Instructional Planner for Assignment 4: Selecting and Caring for Your Clothes

ME-I. (b)(13)(A) understand importance of maintaining good health and proper appearance for effective job performance

Summary of Content

Clothes may or may not be the most important thing in your life. You may be constantly aware of what to wear, conscious of the latest styles, and attentive to the proper care of your clothes. On the other hand, you may not know how to care for your clothes. Whichever is true for you, the way you select and care for your clothes will have a bearing on the way you see yourself. And it will have a bearing on the way others see you.

Instructional Planner for Assignment 5A: Planning Your Wardrobe (for men)

ME-I. (b)(13)(A) understand importance of maintaining good health and proper appearance for effective job performance

Summary of Content

Budgeting for wardrobe purchases, stretching buying power, wearing different clothes for different occasions, and accessories
Wardrobe advice for young adults whose schedules must accommodate both school and work
Clothing purchases to avoid
Color choices that remain popular throughout the year
Items for school and work for female and male customers on a limited budget

Instructional Planner for Assignment 5B: Planning Your Wardrobe (for women)

ME-I. (b)(13)(A) understand importance of maintaining good health and proper appearance for effective job performance

Summary of Content

Budgeting for wardrobe purchases, stretching buying power, wearing different clothes for different occasions, and accessories
Wardrobe advice for young adults whose schedules must accommodate both school and work
Clothing purchases to avoid
Color choices that remain popular throughout the year
Items for school and work for female and male customers on a limited budget

Instructional Planner for Assignment 6: Your Personality

ME-I.	(b)(13)(B)	understand oneself and others
	(b)(13)(C)	exercise self-control
	(b)(13)(F)	demonstrate characteristics for successful working relationships

Summary of Content

Your personality is the sum of all your traits, qualities, characteristics, likes, and dislikes. No one has a personality quite like yours. Everyone has heard people comment on another person's personality. "He has a great personality" or "She has a terrible personality." An important factor in shaping your personality is the outlook you have on life and its problems.

Before you like other people, you must like yourself. Your self-image or self-concept is, simply, the picture you have of yourself. It is everything you think you are. It is probably the most important thing about you.

Instructional Planner for Assignment 7: Your Image: Choices That Influence How Others See You

ME-I. (b)(13)((B) understand oneself and others
(b)(13)(C) exercise self-control

Summary of Content

The way others think of you is important. Your friends, teachers, and employers will form their image of you based on your actions. This created image is a sort of historical record that shapes the way others treat you. Help others to shape a good image of you. You are the only person who can control your actions. Give consideration to others, and they will generally respect and approve of you.

Many people will base their image of you on very short meetings. This may sound unfair, but it isn't. You do the same thing.

Instructional Planner for Assignment 8: How to Relate to Others

ME-I. (b)(13)(B) understand oneself and others
(b)(13)(C) exercise self control
(b)(15)(C) demonstrate proficiency in using listening skills

Summary of Content

You exchange ideas and thoughts with other people by communicating. You will normally communicate by writing or speaking. This assignment deals with speaking, which is a very important communication skill. When you have an idea or thought, you choose certain words to help you communicate. You put them together so that they have meaning. You accent them with a vocal tone that adds extra meaning.

Good speaking habits can be learned. Learn which words and expressions detract from your speech. Learn which tones can help you to communicate. First you have to become aware of your own speaking habits, then you can improve them.

Instructional Planner for Assignment 9: Goals for Your Career

ME-I. (b)(12)(A) identify employment opportunities and preparation in chosen fields
(b)(12)(K) identify ethical practices and responsibilities
(b)(13)(B) understand oneself and others

Summary of Content

Setting goals is one way we can create our own future. The future is shaped by what we want out of life, how we handle conflicts, our ethics, and the leisure activities we choose.

Instructional Planner for Assignment 10: Where Are You Now?

ME-I. (b)(12)(A) identify employment opportunities and preparation in chosen fields
(b)(13)(B) understand oneself and others

Summary of Content

A person's future is usually made by conscious choices. The person who says "I will do my best to succeed" is making a future. Positive outlook and the desire to succeed can help shape anyone's future. Most people start from the same point. The people who get ahead try harder.

Exploring your current inventory of education, skills, aptitudes, and interests gives you confidence in the job search. The ability to express what you know about yourself results in a competitive advantage in the interview situation. Knowing your strengths allows you to move in a career direction that will result in increased job and personal satisfaction.

Instructional Planner for Assignment 11: Your Resume

ME-I. (b)(12)(B) identify effective methods to secure and terminate employment
(b)(13)(B) understand oneself and others

Summary of Content

The process of constructing a resume begins by compiling as much information as you can about yourself. Your personal inventory provides you with a good foundation for this project. Like your inventory, the resume categorizes the background and experience you bring to the job market. The resume allows you to highlight the strengths you have previously identified and present them in the best possible light.

Instructional Planner for Assignment 12: The Interview

ME-I.	(b)(12)(A)	identify employment opportunities and preparation in chosen fields
	(b)(12)(B)	identify effective methods to secure and terminate employment
	(b)(13)(B)	understand oneself and others
	(b)(13)(E)	recognize basic human relationships as they relate to business success

Summary of Content

The employment interview also provides you with a chance to further investigate the specific job and the sponsoring company. You need to know whether the job, the company's employees, its policies, and the work environment meet your expectations. This information allows you to determine whether you really want to work for the organization. Your needs are as valid as the interviewer's.

Instructional Planner for Assignment 13: What's Expected on Most Jobs

ME-I.	(b)(12)(C)	demonstrate effective communication skills (both oral and written) and follow through on assigned tasks
	(b)(12)(D)	demonstrate dependability and punctuality
	(b)(12)(E)	demonstrate productive work habits and attitudes
	(b)(12)(F)	understand the importance of taking pride in the quality of work performed
	(b)(12)(G)	recognize the dignity in work
	(b)(12)(I)	apply required methods and sequences when performing tasks
	(b)(12)(L)	understand the importance of the application of organizational policies and procedures

Summary of Content

Employers convey expectations to their employees through written job descriptions, verbal instructions, unspoken assumptions, and the examples of managers. These expectations form the foundation of any evaluation process through which the employee's performance will be reviewed. It is important that new employees determine the employer's expectations so that their work can meet the specified standards.

If there are questions related to any responsibilities associated with the job, they should be addressed with the management. Clarify any vague policies or procedures before starting each task. This clarification will result in fewer mistakes and miscommunications.

Instructional Planner for Assignment 14: How Jobs Become Careers, and Why You Shouldn't Stop Learning, Ever!

ME-I.	(b)(12)(A)	identify employment opportunities and preparation in chosen fields
	(b)(13)(B)	understand oneself and others
	(b)(13)(E)	recognize basic human relationships as they relate to business success

Summary of Content

The individual interested in a career that offers a chance to do different things, and eventually earn more money, takes advantage of all kinds of learning opportunities. Adopt the attitude that learning is a lifelong process, rather than just a short step on your way to adulthood. You'll find this attitude pays off in more challenging work, greater earning potential, and a more interesting life.

Instructional Planner for Assignment 15: You and Communication on the Job

ME-I . (b)(12)(C)	demonstrate effective communication skills (both oral and written) and follow through on assigned tasks
(b)(13)(B)	understand oneself and others
(b)(15(A)	demonstrate proficiency in oral and written business communication
(b)(15)(B)	identify forms of business communication
(b)(15)(C)	demonstrate proficiency in using listening skills
(b)(15)(D)	recognize the dynamics of nonverbal communications

Summary of Content

Knowing what to say, how to say it, and when to say it keeps business thriving. The employee who practices good communication skills recognizes the importance of these skills and their impact on daily work, business relationships, and promotional advancement. Your communication skills can prove to be your biggest assets. Being able to listen attentively to the ideas of your co-workers and customers, recognize nonverbal forms of communication, and express your ideas clearly enables you to build positive relationships on the job. In doing these things, you promote the success of the company as well as your career.

Instructional Planner for Assignment 16: Managing Your Money

ME-I. (b)(13)(B) understand oneself and others

Summary of Content

Manage your money, or it may begin to manage you. Learn to spend your money for the things you really need. Learn to save for the things you want the most. When you learn to put first things first, you will be in control of your money. Once you become employed, you will need to become a money manager.

Instructional Planner for Assignment 17: Stress Management

ME-I.	(b)(12)(I)	apply required methods and sequences when performing tasks
	(b)(13)(B)	understand oneself and others
	(b)(13)(E)	recognize basic human relationships as they relate to business success
	(b)(13)(F)	demonstrate characteristics for successful working relationships
	(b)(14)(C)	describe the role of management in controlling stress

Summary of Content

Uncontrolled stress results in a multitude of illnesses and addictions. Heart disease, insomnia, high blood pressure, and even alcoholism and drug use are all the consequences of stress. You can avoid these problems by finding alternative outlets for stress. In the workplace, open communication and teamwork can reduce tension. Exercise, sports activities, time management, and meditation techniques also reduce stress. Your efforts to control your stress level will translate into a happier, healthier life.

Instructional Planner for Assignment 18: You and the Management

ME-I.	(b)(12)(D)	demonstrate dependability and punctuality
	(b)(12)(E)	demonstrate productive work habits and attitudes
	(b)(12)(F)	understand the importance of taking pride in the qualityof work performed
	(b)(12)(K)	identify ethical practices and responsibilities
	(b)(12)(L)	understand the importance of the application of organizational policies and procedures
	(b)(13)(D)	accept and use criticism
	(b)(13)(E)	recognize basic human relationships as they relate to business success
	(b)(13)(F)	demonstrate characteristics for successful working relationships
	(b)(14)(A)	explain how management assists in reaching personal and family goals
	(b)(14)(B)	explain the management process
	(b)(14)(G)	identify the role and functions of business management
	(b)(14)(H)	understand the lines of authority
	(b)(14)(I)	identify effective supervisory techniques

Summary of Content

Management's primary role in any business is to ensure the profitability of the organization through the productivity of employees. This is accomplished by hiring the right individuals to do the job, training staff members to accomplish their work, motivating personnel to efficiently perform each task, creating a safe and healthy environment where employees can work, evaluating employee performance, and compensating employees for a job well done. Management also has the responsibility of modeling the behavior that is expected of each employee.

Your relationship with your company's management will define how you succeed at your job. Just as it is management's responsibility to train you, your responsibility is to learn as much as you can and use the learning on the job. Just as management is responsible for creating a safe and healthy environment, your responsibility is to maintain the environment by respecting your co-workers. Just as it is management's responsibility to compensate you for your labor, it is your responsibility to earn each dollar by concentrating on your job and giving it your full effort.

Instructional Planner for Assignment 19: Creating Your Own Success

ME-I.	(b)(12)(C)	demonstrate effective communication skills (both oral and written) and follow through on assigned tasks
	(b)(12)(E)	demonstrate productive work habits and attitudes
	(b)(12)(F)	understand the importance of taking pride in the quality of work performed
	(b)(12)(G)	recognize the dignity in work
	(b)(12)(H)	develop skills in planning and organizing work
	(b)(12)(I)	apply required methods and sequences when performing tasks
	(b)(12)(J)	apply principles of time management and work simplification when performing assigned tasks;
	(b)(12)(L)	understand the importance of the application of organizational policies and procedures
	(b)(13)(E)	recognize basic human relationships as they relate to business success
	(b)(13)(F)	demonstrate characteristics for successful working relationships

Summary of Content

Meeting expectations on the job means that you are giving your full effort to your work. If you are working at an entry-level retail position, meeting expectations suggests that you are fulfilling all the responsibilities outlined on your job description.

Standing out means that you not only do your job well, but take action to learn more, assume additional responsibility, and display an enthusiastic, positive attitude toward work. The 10 percent theory proposes that you can exceed expectations by giving just 10 percent more effort on the job. You may be selling more, providing better customer service, displaying more flexibility, or taking on more responsibility. With only 10 percent extra, you have made yourself extraordinary, and this behavior is observable by others. At all levels of your career, if you commit yourself to 110 percent effort, you will stand out above the crowd and exceed not only management's expectations but, more importantly, your own.

Appendices

- Appendix A. Alphabetized List of Terms to Know
- Appendix B. Definitions of Terms to Know, Correlated to Specific Essential Elements

Appendix A. Alphabetized List of Terms to Know

This alphabetized list of terms is drawn from two sources.

1. "Terms to Know" from the previous Marketing Education I curriculum guide have been included. Definitions for these are in Appendix B, organized according to essential elements, such as **(7)(A).** In some cases a term has one definition that is given for several elements. In others, a term has more than one definition, depending on the element.

2. "Words to Know" from specified chapters in *Marketing Essentials* are also in the list. They are cited by chapter and page, as **(Ch 22-246).** The textbook usually defines words from the "Words to Know" section in italic type in each chapter. The *Annotated Teacher's Edition* also has defined words for several specific chapters, and there is a glossary at the end of the text. In some cases, several sources may need to be checked, and even then it may be necessary to develop a definition.

Accounting software (7)(A)
Action (9)(B)
Adjacent colors (Ch. 22–246)
Ad layout (Ch. 21–234)
Advance dating (11)(B)(Ch. 32–363)
Advertising (9)(D)(Ch. 19–205)
Advertising agencies (Ch. 21–338)
Advertising proof (Ch. 21–235)
Advertising research (Ch. 33–374)
Agent (10)(A)(Ch. 4–77 to 82)
AIDCA (9)(B)
Allowance (Ch. 18–19)
Amateur shoplifter (4)(B)(Ch. 27–290)
Ambitious (9)(A)
American free enterprise (2)(A), (2)(B), (6)(A), (6)(B)
Amount keys (11)(C)
Amount received key (11)(C)
Answer objections (9)(B)(Ch. 10–118)(Ch. 16–176)
Anticipation dating (11)(B)
Anticipation discount (11)(B)
Approach (9)(B)(Ch. 14–157,158)
Apron (8)(B)(Ch. 25–272)
Aptitude (Ch. 43–473)
Area vocational centers (Ch. 44–489)
Area vocational schools (Ch. 44–489)
Assertive (Ch. 10–115)
Associate of Arts, A.A. (Ch. 42–463)
Assumption close (Ch. 17–183)
ATM (automated teller machines) (7)(B)
Attention (9)(B)
Autographic window (11)(C)
Average inventory (11)(A)(Ch. 26–281)

Bachelor of Arts, B.A. (Ch. 42–463)
Bachelor of Education, B.Ed. (Ch. 42–463)
Bachelor of Science, B.S. (Ch. 42–463)
Balance of trade (Ch. 3–31)
Basic stock list (8)(A)(Ch. 26–280)
Benefit (9)(B)
Blind check (8)(B)(Ch. 25–274)
Blocks (Ch. 9–105)
Body language (Ch. 10–114)
Book inventory (8)(A)
Boomerang method (Ch. 16–177)
Brand (Ch. 19–210)
Breakeven point (Ch. 29–326)
Broadcast media (Ch. 20–218)
Business (4)(A)(Ch. 4–39)
Business cycle (Ch. 3–25)
Business environment (4)(A)
Business plan (Ch. 38–427)
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Appendix B. Definitions of Terms to Know, Correlated to Specific Essential Elements

This appendix gives a broader perspective on what terms should be mastered in relation to each essential element. Terms in "Words to Know" section of specific chapters in *Marketing Essentials* sometimes differ from those used previously in Marketing Education I. This list will make it easier for teachers who wish to be certain that specific previous terms continue to be taught. EIMC-Educational Resources offers a *Glossary for Marketing Education* as well as a set of flash cards with those same terms.

75.86 (b)(1) Basic Marketing Principles
(A) Understand the role of marketing in American business.

Buying decisions—rational and emotional choices made by customers when they select and purchase goods and services to meet their needs and wants.

Consumers—persons and organizations who use goods and services. May also be customers.

Customers—persons and organizations who purchase goods and services. May also be consumers.

Distributing—moving, handling, and storing of goods and services from their producers to their consumers.

Good—product that is grown or manufactured to meet consumer needs and wants.

Market—all present and potential customers for a good or service. Includes people and organizations with needs and wants, the money to satisfy those needs and wants, and the willingness to spend that money for the right goods or services.

Marketing—system of planning, pricing, promoting, and distributing goods and services that links producers to consumers who make buying decisions to satisfy their needs and wants and in doing so create profits.

Need—something that is essential, such as food, clothing, or shelter.

Planning—setting goals and establishing policies and procedures for reaching those goals.

Pricing—estimating the value and setting the price of a good or service.

Producers—persons and organizations who grow agricultural goods, manufacture crude materials into useful items, or provide services to meet consumer needs and wants.

Profit—(1) reward for taking business risks; (2) amount of money left over from income after all costs and operating expenses have been deducted.

Promoting—conducting personal and nonpersonal activities to attract potential customers to a business and to persuade them to buy its goods and services. Includes personal selling, advertising, visual merchandising, publicity, and sale promotion. Facilitates function of marketing.

Service—helpful, useful, or beneficial work provided by businesses to meet consumer needs and wants.

Want—something that is desirable but not essential.

75.86 (b)(1) Basic Marketing Principles
(B) Understand the basic vocabulary of marketing.

Form utility—usefulness of goods or services because of their features or benefits. Also called **product utility**.

Marketing mix—combination of the four marketing elements of product, price, place, and promotion. Key to successful marketing is having the right combination of these four elements (that is, having the right product at the right price in the right place with the right promotion).

Objection—potential customer's concern or hesitation when considering whether to purchase a particular product or service. Involves factors such as perceived need, benefit, value, and service.

Place—location where goods or services are offered for sale or rent. Examples include independent, chain, and franchised locations and leased departments.

Place utility—usefulness of goods or services because they are available for sale at convenient locations.

Possession utility—usefulness of goods or services because possible delays in customer ownership have been reduced or eliminated.

Price—estimated value of a good or service. Usually noted in terms of money, but something else of value can be substituted for money or used in combination with it.

Product—good or service that is provided to meet consumer needs and wants.

Promotion—personal and nonpersonal activities designed to attract potential customers to a business and to persuade them to buy its goods or services. Includes personal selling, advertising, visual merchandising, publicity, and sales promotion.

Time utility—usefulness of goods or services because they are offered at the appropriate times during the year and at convenient times during the day.

Utility—usefulness of a good or service to a customer or consumer. Added through production or marketing processes.

Value added—advantages that marketing provides consumers by making goods and services available to them. Costs involved in providing these advantages are passed on to consumers in higher prices.

75.86 (b)(1) Basic Marketing Principles
(C) Define marketing as it impacts on consumers.

Consumers—persons and organizations who use goods and services. May also be customers.

Customers—persons and organizations who purchase goods and services. May also be consumers.

Marketers—persons and organizations who work within marketing.

Marketing—system of planning, pricing, promoting, and distributing goods and services that links producers to consumers who make buying decisions to satisfy their needs and wants and in doing so create profits.

Producers—persons and organizations who grow agricultural goods, manufacture crude materials into useful items, or provide services to meet consumer needs and wants.

75.86 (b)(2) Basic Marketing Functions
(A) Describe the application and use of economic resources in marketing.

Capital—element of the economy that includes money, buildings, tools, and machinery used in the production and distribution of goods and services.

Discretionary fund—amount of a person's discretionary income and installment purchases. Discretionary Income + Installment Purchases = Discretionary Fund

Discretionary income—amount of money a person has available to spend after the essentials of food, clothing, shelter, and transportation have been paid from his or her disposable income. Disposable Income - Expenses for Essentials = Discretionary Income.

Disposable income—amount of money a person has to spend after all local, state, and federal taxes have been subtracted from his or her personal income. Personal Income - Taxes = Disposable Income

Economy—system of producing, distributing, and consuming goods and services.

Free enterprise—system in which economic resources (land, labor, and capital) are privately owned and managed rather than government-controlled. Also called **private enterprise**.

Government—element of the economy that includes local, state, and federal laws, regulations, taxes, and services.

Gross national product (GNP)—total market value of the goods and services produced in the nation during a one-year period, usually expressed in dollars.

Labor force—element of the economy that includes the total available work force (that is, those who are able to work and who are employed or are seeking employment).

Management—element of the economy that includes the people who decide how natural resources, capital, and labor are used to produce and distribute goods and services.

Modified free enterprise—type of free enterprise, found in the United States, in which the government controls some economic decisions. Also called **modified private enterprise** and **American free enterprise**.

National income—total amount of money earned by the nation's employees and business owners during a one-year period while producing the nation's goods and services.

Natural resources—element of the economy that includes land, minerals, water, and plant life.

Net national product—gross national product minus decreases in the value of equipment and buildings used in the production of the goods during the year (decreases due to wear and tear and obsolescence).

Personal expenditures—amount of money a person spends on goods and services, both essential (nondiscretionary) and nonessential (discretionary).

Personal income—amount of money a person receives from all sources, such as salary, fees, dividends, interest, and social security.

Productivity—performance of work that is beneficial or profitable.

75.86 (b)(2) Basic Marketing Functions
(B) Understand how marketing impacts our standard of living.

Command economy—system in which the economic needs and wants of consumers are met through the activities and decisions of the national government. The national government determines what and how many goods and services will be produced, when and how they will be produced, and when and how they will be distributed. Also called a **planned economy**, a **controlled economy**, or a **directed economy**.

Free enterprise—system in which economic resources (land, labor, and capital) are privately owned and managed rather than government-controlled. Also called **private enterprise**.

Market economy—system in which the economic needs and wants of consumers are met through the activities and decisions of a free market. Consumer buying decisions determine what and how many goods and services will be produced, when and how they will be produced, and when and how they will be distributed. Also called a **free economy**.

Modified free enterprise—type of free enterprise, found in the United States, in which the government controls some economic decisions. Also called **modified private enterprise** and **American free enterprise**.

Standard of living—how well the people of a nation live, as measured by the number and kinds of goods and services available to meet their economic needs and wants.

75.86 (b)(2) Basic Marketing Functions
(C) Learn how marketing is organized by its functions.

Buying—selecting and ordering goods and services for resale to customers to satisfy their needs and wants and to produce a profit; exchange function of marketing.

Financing—borrowing capital to operate a business; facilitating function of marketing.

Grading—sorting goods into categories according to predetermined specifications; facilitating function of marketing.

Packaging—using containers and wrapping materials to protect, contain, identify, promote, and facilitate the use of products; facilitating function of marketing.

Product planning—directing and controlling all aspects of a product during its lifetime; facilitating function of marketing.

Promoting—conducting personal and nonpersonal activities to attract potential customers to a business and to persuade them to buy its goods or services. Includes personal selling, advertising, visual merchandising, publicity, and sales promotion; facilitating function of marketing.

Researching—gathering, recording, and analyzing facts about problems that relate to the transfer and sale of goods and services from producer to consumer; facilitating function of marketing.

Risk-taking—operating a business despite potential losses from market changes, natural causes, and human frailty and unpredictability; facilitating function of marketing.

Selling—attempting to persuade potential customers to purchase goods or services; exchange function of marketing.

Storing—using public or private warehouses to hold and protect products in transit from producers to consumers; physical distribution function of marketing.

Transporting—moving goods from producer to consumer by motor, rail, water, air, or pipeline; physical distribution function of marketing.

75.86 (b)(3) Business Policies, Forms, and Records
(A) Interpret and carry out business policies.

Merchandise policies—business policies designed to help meet the anticipated needs and wants of a business's market.

Personnel policies—business policies designed to ensure loyal and productive employees.

Policies—requirements and guidelines established by a business or other organization to regulate its own operations.

Service policies—business policies designed to create a certain image in the minds of its customers before, during, and after the sale.

75.86 (b)(3) Business Policies, Forms, and Records
(B) Follow employer's safety rules and regulations.

On-the-job safety—procedures and practices at work to ensure the well-being of employees and customers.

OSHA (Occupational Safety and Health Administration)—federal agency that enforces rules and standards designed to protect employee health and safety in the work place. OSHA also stands for **Occupational Safety and Health Act**, the federal legislation that established the administration.

75.86 (b)(3) Business Policies, Forms, and Records
(C) Complete required business forms and records.

Form—document, either printed or electronic, used to collect and organize information regarding business transactions.

Identification fact—type of transaction fact that indicates the nature of the transaction and its pertinent characteristics, such as size, color, brand, etc.

Quantitative fact—type of transaction fact that indicates the number of items in a transaction and their value.

Record—organized collection of information regarding business transactions.

Transaction—business activity in which information, merchandise, or money is exchanged.

75.86 (b)(4) Business Environment, Law, and Ethics
(A) Understand how laws, policies, and regulations are applied to business situations.

Business—activities of an individual or group of individuals involved in the production or distribution of goods or services.

Business environment—internal and external conditions that influence a business and its operations, some of which can be controlled by the business and some of which cannot.

Laws—legislation through which state and federal governments limit and require certain behaviors of the public in general and businesses in particular.

Policies—requirements and guidelines established by a business or other organization to regulate its own operations.

Regulations—rules established by governmental agencies or boards to carry out the laws that they are responsible for enforcing.

75.86 (b)(4) Business Environment, Law, and Ethics
(B) Identify external and internal security procedures.

Amateur shoplifter—shoplifter who steals merchandise for personal use, rather than for resale. Reasons may include a need for excitement, a need for attention, or kleptomania.

Counterfeiter—person who makes fake money, money orders, gift certificates, payroll, or traveler's checks.

External security—steps taken to control store losses due to reasons other than employees.

Internal security—steps taken to control store losses due to employee dishonesty or carelessness.

Kleptomania—abnormal and persistent impulse to steal.

Money manipulator—person who steals money from a business by confusing the cashier during checkout.

Professional shoplifter—shoplifter who makes a living by stealing merchandise for resale and profit.

Shoplifter—person who steals merchandise on display in a store where he or she is not employed. May be a professional or an amateur.

Surveillance system—set of procedures for monitoring merchandise and customer behavior through physical, mechanical, or electronic means.

75.86 (b)(5) Marketing Management
(A) Identify the role and functions of management.

Controlling—management function of measuring and regulating the performance or productivity of a business's employees in accordance with a plan or standard.

Directing—management function of providing leadership for accomplishing a business's goals.

Leadership—ability to influence people to accomplish a goal.

Management—process of planning, controlling, staffing, organizing, and directing the entire operation of a business so that it runs efficiently and profitably.

Organizing—management function of designing a system that uses a business's resources to accomplish its goals.

Planning—management function of determining in advance a business's objectives and how those objectives will be met.

Productivity—performance of work that is beneficial or profitable.

Staffing—management function of hiring, placing, training, evaluating, and compensating a business's employees.

75.86 (b)(5) Marketing Management
(B) Understand lines of authority.

Formal organization—official structure outlining how a business's work is to be done. Often shown in an organization chart.

Informal organization—relationships and practices involved in getting a business's work done on a day-to-day basis.

Job description—written summary of the specific duties and responsibilities of a particular position, including the relationship of that position to supervisors, co-workers, and subordinates, if any.

Line of authority—formal structure indicating who is responsible for what and who reports to whom.

Organization—way a business's activities are divided, arranged, and structured, so that they can be carried out in an efficient and coordinated manner and the business can operate successfully and profitably. A business's organization depends on a variety of factors, such as its size, the merchandise or services it offers, and its legal form.

Organization chart—diagram that shows the division of work, the levels of authority, and the relationship of employees to each other and to the overall business operation.

75.86 (b)(5) Marketing Management
(C) Identify effective supervisory techniques.

Directing—supervisory function of providing guidance to certain employees to help them in accomplishing their assigned duties and tasks.

Evaluating—supervisory function of determining how well certain employees are doing their assigned duties and tasks and how well they are getting along in the organization.

Following up—supervisory function of checking to make sure all assigned duties and tasks have been carried out as requested.

Liaison—supervisory function of serving as a link between managers and certain employees to help promote mutual understanding between them.

Management—process of planning, controlling, staffing, organizing, and directing the entire operation of a business so that it runs efficiently and profitably.

Motivating—supervisory function of encouraging certain employees' to do their jobs well.

Planning—supervisory function of deciding in advance what needs to be done to accomplish certain objectives, who will do it, and when it will be done.

Problem solving—supervisory function of making certain decisions and taking action to reduce or eliminate problems.

Supervision—directing and overseeing certain employees so that they accomplish their assigned duties and tasks.

Supervisor—person responsible for directing and overseeing employees so that their assigned duties and tasks are accomplished.

Training—supervisory function of providing certain employees with additional skills and knowledge so that they can do better jobs.

75.86 (b)(6) The Free Enterprise System and Its Benefits
(A) Analyze the risk and profit motive factor.

Competition—rivalry between businesses for customers.

Free enterprise—system in which economic resources (land, labor, and capital) are privately owned and managed rather than government-controlled. Also called **private enterprise**.

Modified free enterprise—type of free enterprise, found in the United States, in which the government controls some economic decisions. Also called **modified private enterprise** and **American free enterprise**.

Profit—(1) reward for taking business risks; (2) amount of money left over from income after all costs and operating expenses have been deducted.

Standard of living—how well the people of a nation live as measured by the number and kinds of goods and services available to meet their economic needs and wants.

75.86 (b)(6) The Free Enterprise System and Its Benefits
(B) Explain the concept of supply and demand.

Buyer's market—market in which goods or services are plentiful, buyers have a wide range of choices, and prices tend to be low.

Demand—quantity of a good or service that consumers are willing and able to buy at a particular time and price.

Seller's market—market in which goods or services are scarce, buyers have a limited range of choices, and prices are high.

Supply—quantity of a good or service offered for sale at a particular time and price.

75.86 (b)(6) The Free Enterprise System and Its Benefits
(C) Understand types of business ownership.

Charter—legal document that establishes a business's rules of operations, such as its name and the number of shares of stock it will issue.

Conglomerate—business organization made up of firms in unrelated industries.

Cooperative—business owned and operated by its customers.

Corporation—business owned by stockholders or investors and operated under a government charter.

Partnership—business owned by two or more people.

Sole proprietorship—business owned by one person. Also called an **individual proprietorship**.

Stockholders—owners of stocks or shares in a corporation who elect a board of directors, vote on business and management issues, and divide any profits in proportion to their shares of ownership. Also called **shareholders**.

75.86 (b)(6) The Free Enterprise System and Its Benefits
(D) Identify the role of the entrepreneur in a free enterprise system.

Entrepreneur—a person who organizes, manages, and assumes the risks of a business.

Free enterprise (system in which economic resources) land, labor, and capital—are privately owned and managed rather than government-controlled. Also called **private enterprise**.

Modified free enterprise—type of free enterprise, found in the United States, in which the government controls some economic decisions. Also called **modified private enterprise** and **American free enterprise**.

75.86 (b)(7) Computer Literacy and Applications
(A) Develop computer literacy applicable to marketing occupations.

Accounting software—database or spreadsheet computer program designed specifically for maintaining financial accounts.

Data—factual information.

Database software—computer program that allows users to enter, edit, store, sort, and retrieve information in the combinations, formats, and sequences they desire.

Graphics software—computer program that allows users to display information in a picture, diagram, map, or graph rather than in words.

Hard copy—information printed on paper or other durable surface.

Hardware—physical machinery that makes up a computer system.

Input—entering data or commands into a computer.

Output—retrieving data from a computer, either as soft copy or hard copy.

Processing—manipulating or changing data by computer.

Project management software—computer program that allows users to schedule time, people, supplies, and equipment to provide maximum use of these resources.

Soft copy—information displayed temporarily, such as on a screen or other device.

Software—list of written instructions or commands that tell a computer what tasks to perform and in what order. Written in a computer language, usually on disks or magnetic tape. Also called a **computer program**.

Spreadsheet software—computer program that allows users to enter and store numbers in rows and columns and to quickly and easily calculate and recalculate formulas using these numbers.

Storage—keeping data for later use on a computer disk or magnetic tape.

Telecommunications software—computer program that allows users to transmit information over long distances, usually over telephone wires.

Word processing software—computer program that allows its users to type text, see text displayed on a screen, and easily change and format text before printing it.

75.86 (b)(7) Computer Literacy and Applications
(B) Develop an awareness of specific applications of computers in marketing.

Automated teller machines (ATM)—machines that allow 24-hour-a-day automatic banking services for those with bank-issued cards.

Electronic data processing—using a computer to record, manipulate, and report business-related information.

Electronic funds transfer (EFT)—automatic transfer of money from a customer's bank account to a store's bank account as payment for a purchase.

Electronic point-of-purchase—computerized check-out system in which a cashier passes a coded item by a scanner, the sale is automatically calculated and displayed at the cash register and the appropriate sales and inventory information is recorded in a computer. Also called **electronic point-of-sale**.

Optical scanning—reading price and inventory information from a coded ticket by passing the ticket over a reading device or passing a wand over the ticket.

UPC (Universal Product Code) system—product classification system of symbols, each unique to a particular product, which call up prices and other inventory information from a computer when read by optical scanners. These symbols, made up of numbers and thick and thin vertical lines, are used mainly for food and drug products.

UVM (Universal Vendor Marking) system—product classification system of standardized magnetically-coded markings which call up prices and other inventory information from a computer when read by optical scanners. These markings, which resemble normal printing, are used mainly for general merchandise. Also called **OCR-A (optical character recognition)**.

75.86 (b)(8) Inventory Control Systems
(A) Understand various inventory systems.

Basic stock list—list of staple items that should always be kept in stock because they are in continuous demand.

Color coding—physical inventory technique that assigns different colors to merchandise in different shipments so employees can easily tell which merchandise has been in stock the longest.

Dollar stock control—stock control system based on the dollar value of goods in stock, either cost or retail prices.

Inventory—quantity of goods in stock.

Inventory control system—procedures for matching the quantity of goods in stock with the quantity of goods in demand, without too much oversupply or loss.

Minimum stock point—point at which the merchandise should be reordered.

Model stock list—list of items that should be kept in stock to maximize the store's selling potential.

Perpetual inventory—amount of goods in stock as determined by store records. Also called **book inventory**.

Physical inventory—amount of goods in stock as determined by an actual count of those goods.

Reorder control—physical inventory technique in which a card, slip, or gummed label containing appropriate reorder information is used to mark the minimum stock point. When the stock reaches that level, the card, slip, or label appears and is forwarded to the buyer for use in reordering.

Tickler control—physical inventory technique in which an entire inventory for a certain period is calculated by counting portions of the stock at regular intervals. Timing of counts is usually signaled by a reminder (tickler) card. Also called **rotated inventory** because stock counts occur on a rotated or staggered basis.

Unit stock control—stock control system based on the number of items in stock.

75.86 (b)(8) Inventory Control Systems
(B) Check incoming stock and complete stock control records.

Apron—type of receiving record that includes all the important information about a shipment from the time it is ordered until it is paid.

Blind check—type of quantity check in which the number of goods received is compared with the number indicated on the invoice only after the count has been completed.

Checking—step in the receiving operation that involves inspecting the goods to ensure they are the quality and quantity ordered.

Direct check—type of quantity check in which the number of goods received is compared with the number indicated on the invoice as they are counted.

Distributing—step in the receiving operation that involves moving the goods to the stockroom or to the selling floor.

Dummy invoice—invoice used in conducting blind checks of goods received.

Marking—step in the receiving operation that involves marking or tagging individual items with prices and other identifying information.

Quality check—verification that the goods received are in good condition and are of the level of workmanship ordered.

Quantity check—count of the goods received to ensure they are of the appropriate number and kind.

Receiving—step in the receiving operation that involves taking physical possession of goods from the shipper.

Receiving operation—activities that occur from receipt of goods at the store to arrival of those goods in the stockroom or on the selling floor.

Receiving record—official document for each shipment of incoming goods.

Unpacking—step in the receiving operation that involves opening cartons or other protective packaging and removing the goods from them.

75.86 (b)(9) Merchandising, Selling and Service

(A) Identify the personality traits needed by an effective salesperson.

Ambitious—having a strong desire to advance or succeed.
Characteristic—distinguishing trait or quality.
Considerate—thoughtful of the feelings and rights of others.
Cooperative—willing and able to work with others.
Dependable—reliable.
Empathetic—able to feel or think as someone else does.
Enthusiastic—strongly or eagerly interested.
Grooming—steps in making oneself neat and physically attractive.
Honest—truthful, sincere, fair, and straightforward.
Industrious—works energetically, steadily, and seriously.
Initiative—seeing what needs to be done and doing it without being told.
Loyal—being concerned about the welfare and protecting the interests of a person or organization.
Posture—way one holds his or her body when sitting, standing, and walking.
Punctual—on time.
Self-confident—positive about one's self and one's abilities.
Self-controlled—able to restrain one's emotions and behaviors.
Tactful—able to say and do the right thing at the right time.

75.86 (b)(9) Merchandising, Selling and Service

(B) Demonstrate the ability to assist a customer in making a good buying decision.

Action—fifth mental stage of a buying decision in which customers indicate a readiness to buy specific goods or services.
AIDCA—abbreviation for the five mental stages through which customers pass before making buying decisions. Stages include **a**ttention, **i**nterest, **d**esire, **c**onviction, and **a**ction.
Answer objections—step in the sales process that includes responding to customers' concerns and hesitancies regarding potential purchases.
Approach—step in the sales process that includes greeting customers and gaining their trust.
Attention—first mental stage of a buying decision in which customers notice and pay attention to specific goods or services offered for sale.
Benefit—advantage a particular good or service offers its user.
Buying—customers selecting and purchasing goods and services to satisfy their own or someone else's needs and wants.
Buying motives—needs and wants that influence customers to purchase goods and services.
Close the sale—step in the sales process that includes completing the sales by obtaining customers' commitments to buy.
Conviction—fourth mental stage of a buying decision in which customers feel they have more to gain from buying specific goods or services than from not buying them.
Desire—third mental stage of a buying decision in which customers feel they will be lacking something if they do not have specific goods or services.
Determine wants and needs—step in the sales process that includes questioning customers regarding their wants and needs to help in determining what products might be best for them.
Emotional buying motive—buying motive that is based on feelings, such as status, pride, and adventure.
Feature—descriptive fact about a particular good or service.
Interest—second mental stage of a buying decision in which customers become concerned or curious about specific goods or services.
Nonpersonal selling—indirect effort to convince groups of potential customers to buy goods or services. Includes advertising, visual merchandising, publicity, and sales promotion. Also called **mass selling**.

Patronage buying motive—buying motive that is based on factors related to the business from which the good or service is purchased, such as its service, sales staff, and atmosphere.

Personal selling—direct effort by a salesperson to convince a specific potential customer to buy a good or service.

Physical buying motive—buying motive that is based on the body, such as hunger, thirst, and safety.

Preapproach—step in the sales process that includes preparing for the sale.

Present features and benefits—step in the sales process that includes describing the characteristics and advantages of the products that seem to best match the customers' needs and wants.

Product buying motive—buying motive that is based on the good or service itself, such as its features, benefits, and price.

Psychological buying motive—buying motive that is based on the mind, such as love, ego-support, and ego-defense.

Rational buying motive—buying motive that is based on reason, such as efficiency, dependability, and saving time.

Suggestion selling and reassurance—step in the sales process that includes suggesting products related to the purchases, reassuring customers of the wisdom of their purchases, and thanking customers for their business.

75.86 (b)(9) Merchandising, Selling and Service

(C) Demonstrate the ability to merchandise products and services properly.

Merchandise—goods offered for sale.

Merchandise breadth—number of merchandise lines carried by a store.

Merchandise depth—number of goods stocked by a store in each of the various colors, sizes, styles, and prices ranges.

Merchandise mix—variety of merchandise lines carried and the breadth and depth in which each of these lines are stocked.

Merchandise plan—buying plan or budget indicating how much money is available for purchases during a specified period of time.

Merchandising—series or combination of strategies that puts the right good or service in the right place, in the right quantities and assortments, in the right light, at the right time, and at the right price.

75.86 (b)(9) Merchandising, Selling and Service

(D) Understand the use of promotion for preselling.

Advertising—nonpersonal promotion in which businesses pay to inform the public about their goods, their services, or their selves.

Institutional promotion—promotional activities that focus on the business itself to build its image.

Market—all present and potential customers for a good or service. Includes people and organizations with needs and wants, the money to satisfy those needs and wants, and the willingness to spend that money for the right goods or services.

Personal selling—direct effort by a salesperson to convince a specific potential customer to buy a good or service.

Preselling—convincing potential customers through promotional activities to buy a good or service before they come in contact with salespeople.

Product promotion—promotional activities that focus on a business's goods or services to create customer traffic and sales.

Promotion—personal and nonpersonal activities designed to attract potential customers to a business and to persuade them to buy its goods or services. Includes personal selling, advertising, visual merchandising, publicity, and sales promotion.

Promotional campaign—series of coordinated promotional activities directed toward certain desired outcomes.

Promotional mix—combination of promotional activities used in a promotional campaign.

Publicity—nonpersonal promotion in which independent sources inform the public about goods, services, or businesses, without being paid by the businesses to do so.

Sales promotion—nonpersonal promotional activities other than advertising, personal selling, publicity, and visual merchandising. Examples include coupons, trading stamps, contests, games, sweepstakes, calendars, and matchbooks.

Target market—defined segment of a market toward which a business directs its promotional activities.

Visual merchandising—nonpersonal promotion that includes anything visual done with, to, or for goods, services, and their surroundings to improve the saleability of those goods and services.

75.86 (b)(10) The Distribution Process and Systems
(A) Identify channels of distribution and use appropriate terminology.

Agent—individual or business that sells goods or services for a producer to a wholesaler or retailer without ever owning those goods or services.

Channel of distribution—path a good or service takes from its producer or manufacturer to its consumer.

Direct channel of distribution—distribution channel in which goods or services move directly from the producer to the consumer without middlemen.

Indirect channel of distribution—distribution channel in which goods or services pass through one or more middlemen on their way from the producer to the consumer.

Middleman—individual or business that assists in the distribution of goods from the producer to the consumers, including agents, wholesalers, and retailers.

Physical distribution—activities associated with actual movement and storage of goods.

Retailer—individual or business that sells goods or services to consumers.

Wholesaler—individual or business that buys goods or services from producers and sells them to retailers.

75.86 (b)(10) The Distribution Process and Systems
(B) Select appropriate channels for products and services.

Exclusive distribution—distribution channel in which goods or services are distributed through only one middleman within a given geographical area.

Integrated distribution—distribution channel in which producers act as their own retailers or wholesalers.

Intensive distribution—distribution channel in which goods or services are distributed through any middleman who wants to distribute them.

Length of a channel of distribution—number of middlemen through whom a good or service passes on its way from the producer to the consumer.

Selective distribution—distribution channel in which goods or services are distributed through a number of middlemen within a geographical area.

Width of a channel of distribution—number of channels through which a good or service is marketed.

75.86(b)(11) Marketing Mathematics
(A) Understand and apply *markup*, *markdown*, and stockturn.

Cost—amount retailers pay for the goods or services that they sell, including the price of the goods or services themselves, transporting the goods to the store, and altering the goods for sale, if needed.

Markdown—price reduction from an existing retail price to a lower retail price.

Markdown percentage—proportion by which an existing retail price is reduced to a lower retail price.

Markup—amount added to the cost or existing retail price of goods or services, resulting in a new retail price. Pays expenses and provides a net profit.

Markup percentage—proportion by which the cost or existing retail price of goods or services is increased to a new retail price.

Operating expenses—operating costs of a business, such as payroll, rent, utilities, promotion, insurance, taxes, licenses and fees, maintenance and repairs, stationery and business forms, etc. *Does not include the cost of goods or services for sale.* Also called **expenses**.

Price—estimated value of a good or service. Usually noted in terms of money, but something else of value can be substituted for money or used in combination with it.

Price reduction—lowering the retail price of goods or services. Includes employee discounts, customer discounts, inventory shortages, and markdowns.

Pricing—estimating the value andsetting the price of a good or service.

Retail price—price for which goods or services are to be sold to consumers. Includes the cost of the good or service, a share of the business's operating expenses, and a net profit. Also called **selling price** or **retail**.

75.86(b)(11) Marketing Mathematics
(A) Understand and apply markup, markdown, and *stock turn*.

Average inventory—mathematical average of dollar amounts of two or more inventories or stock counts taken during a given period of time.

Stock turn--number of times a quantity of merchandise is sold and replaced during a given period of time, such as a season, year, month, or week. Also called **stock turnover.**

75.86 (b)(11) Marketing Mathematics
(B) Demonstrate ability to calculate *profit*, *loss*, payroll, invoices, taxes, interest, sales slips, credit card purchases, and purchase orders.

Gross profit—amount of money left over from net sales after the cost of goods sold have been deducted. Also **gross margin**. Gross Profit = Net Sales - Cost of Goods Sold.

Gross sales—amount of money received from goods or services sold.

Net income—amount of money left over from gross profit after operating expenses have been deducted. Net Income = Gross Profit - Operating Expenses.

Net loss—occurs when operating expenses exceed gross profit.

Net profit—occurs when gross profit exceeds operating expenses.

Net sales—amount of money left over from gross sales after refunds and allowances have been deducted. Net Sales = Gross Sales - Refunds and Allowances.

Operating expenses—operating costs of a business, such as payroll, rent, utilities, promotion, insurance, taxes, licenses and fees, maintenance and repairs, stationery and business forms, etc. *Does not include the cost of goods or services for sale.* Also called **expenses**.

Profit—(1) reward for taking business risks; (2) amount of money left over from income after all costs and operating expenses have been deducted.

Profit-and-loss statement—financial statement that shows the relationship between a business's sales, costs of goods and services sold, operating expenses, and resulting profits or losses during a specific period of time. Also called **income statement** or **operating statement**.

75.86 (b)(11) Marketing Mathematics

(B) Demonstrate ability to calculate profit, loss, *payroll*, invoices, taxes, interest, sales slips, credit card purchases, and purchase orders.

Commission—money paid to employees based on a percentage of the sales they make during the pay period. Employees may earn straight commission without any salary, commission with draw, or salary plus commission.

Deductions—money withheld from employees' gross salaries when they are paid.

Draw—allowance paid to employees against their anticipated commissions to help offset expenses incurred as part of the job, such as car expenses and travel expenses.

Federal income withholding tax—money automatically deducted from employees' gross salaries when they are paid. Credited to their annual federal income tax debts.

F.I.C.A. (Federal Insurance Contributions Act)—set percentage of employees' gross salaries that is automatically deducted from their paychecks. Commonly called **social security**.

Fringe benefits—advantages employees receive in addition to their regular earnings, such as discounts, vacation time, sick leave, holidays, and health insurance.

Gross earnings—amount of money earned by employees for services performed on the job.

Net earnings—gross earnings minus deductions. Also called **take-home pay**.

Overtime—money paid to employees who work more than a specified number of hours per week, usually 40. Often one and a half or two times the employees' regular hourly rates. Usually does not apply to salaried employees.

Premium money (PM)—bonus paid to employees who sell items that are slow-moving or difficult to sell.

Quota plan—bonus paid to employees for exceeding their sales quotas. Bonus is a percentage of sales above the quota.

Salary—set amount of money paid to employees for services performed during a pay period, regardless of the number of hours worked or the number of pieces produced or finished. Employees may earn salary plus commission, salary plus quota bonus, or just straight salary.

Tax exemptions—allowances made for people including the employee who rely on the employee for food, clothing, and shelter. Used in calculating the amount of federal income tax the employee owes.

Wages—money paid to employees for services performed, based on the number of hours worked or the number of pieces produced or finished.

75.86 (b)(11) Marketing Mathematics

(B) Demonstrate ability to calculate profit, loss, payroll, *invoices*, taxes, interest, sales slips, credit card purchases, and purchase orders.

Advance dating—invoice term that means payment due date is based on a stated future date. Example: "net 30, as of August 1" means payment is due 30 days from August 1, or August 31 (August 1 + 30 days). Also called **postdating**.

Anticipation discount—price deduction allowed when an invoice is paid earlier than the cash discount date. Also called **anticipation dating**.

Cash discount—price deduction allowed for quick payment. Example: "2/10" means if paid within 10 days of the invoice date, a deduction of 2% may be taken.

Cumulative discount—price deduction allowed for purchasing certain amounts of goods or services over a specified time period.

Dating—time that buyers are allowed before payment of the invoice is due.

Discount—price reduction from basic or list prices.

EOM (end of month)—invoice term that means payment due date is figured from the end of the month. Example: "net 30 EOM" means payment is due within 30 days after the end of the month shown on the invoice.

Extra dating—invoice term that means extra days are allowed for payment. Example: "net 30, + 40" means payment is due 70 days (30 + 40) from the invoice date.

FOB (free on board)—seller pays transportation costs to a specified location; buyer pays for any additional transportation. Example: "FOB Houston" means delivery is free to Houston.

FOB destination—seller pays all transportation costs.

FOB point of origin—buyer pays all transportation costs.

FOB port of entry—seller pays transportation costs to the point where the goods enter the country; buyer pays for any additional transportation.

Invoice—written form used by a seller to bill a buyer for goods or services provided.

Invoice control—procedures to keep track of invoices from the time they are received by the buyer to the time they are paid.

Net 30 (n/30)—invoice term that means payment is due within 30 days of the invoice date. Similar codes indicate payment is due within a different number of days, such as net 45 (n/45), net 60 (n/60), and net 90 (n/90).

On account—goods or services sold on credit, usually allowing 30 to 90 days for payment.

Quantity discount—price deduction allowed when an unusually large quantity of goods is purchased.

ROG (receipt of goods)—invoice term that means payment due date is figured from the time the goods are received by the buyer. Example: "net 30 ROG" means payment is due within 30 days of the date the buyer receives the goods.

Seasonal discount—price deduction allowed when items are purchased during an off-season.

Trade discount—method of quoting prices to retailers and wholesalers based on basic or list prices.

75.86 (b)(11) Marketing Mathematics

(B) Demonstrate ability to calculate profit, loss, payroll, invoices, *taxes*, interest, sales slips, credit card purchases, and purchase orders.

Sales tax—extra charges added to the retail prices of most products and some services when they are sold. Revenues are used to run the state government and to help provide certain public services.

Tax revenue—money collected through taxes.

75.86 (b)(11) Marketing Mathematics

(B) Demonstrate ability to calculate profit, loss, payroll, invoices, taxes, *interest*, sales slips, credit card purchases, and purchase orders.

Interest—amount of money paid by a borrower to a lender or creditor in return for the use of an agreed-upon amount of money.

Interest rate—percentage of the borrowed money paid by the borrower to the lender or creditor in return for the use of that money.

Principal—amount of money borrowed.

Simple interest—method of calculating interest so interest is charged only on the outstanding balance of the loan. Simple Interest = $\frac{\text{Principal x Rate x Number of Days}}{360}$

Total loan amount—sum of the amount of money borrowed and the interest paid in return for the use of that money.

75.86 (b)(11) Marketing Mathematics

(B) Demonstrate ability to calculate profit, loss, payroll, invoices, taxes, interest, *sales slips*, credit card purchases, and purchase orders.

Cash refund—good is returned to the store where it was purchased and the customer receives the amount paid for it in money or a check.

Cash sale—goods or services are received at the time of purchase and paid for at that time with money or a check.

Cash-send transaction—cash sale in which the goods purchased are delivered.

Cash-take transaction—cash sale in which the customer takes the goods purchased with him or her.

Charge credit—good is returned to the store where it was purchased and the customer receives the amount paid for it as credit on his or her charge account. Also called **charge return**.

Charge sale—goods or services are received at the time of purchase but are paid for at a later date.

Charge-send transaction—charge sale in which the goods purchased are delivered.

Charge-take transaction—charge sale in which the customer takes the goods purchased with him orher.

COD sale—goods are paid for when they are delivered. Also called **cash on delivery** or **collect on delivery**.

Discount sale—sale to an employee at a reduced price, with the reduction usually being a percentage of the retail price.

Even exchange—returned item is exchanged for another item at the same price.

Gift certificate—written statement that indicates a specific amount of money is available to spend at a business, usually paid for by one person for another.

Layaway sale—sale in which a customer pays a cash deposit on an item at the time of purchase and the balance is due over a set period of time. The item is set aside and given to the customer after the total price has been paid.

Received on account—customer pays toward the balance of his or her credit account.

Sales slip—written record of a sales transaction, generated by hand or by a cash register. Also called **sales check, sales receipt,** or **sales form**.

Uneven exchange—returned item is exchanged for another item at a different price. If the new item is more expensive, the customer pays the difference to the business. If the new item is less expensive, the business refunds the difference to the customer.

75.86 (b)(11) Marketing Mathematics

(B) Demonstrate ability to calculate profit, loss, payroll, invoices, taxes, interest, sales slips, *credit card purchases*, and purchase orders.

Charge slip—written record of a charge sale transaction. Generated by (1) using an embossing machine to imprint information from the customer's charge card and (2) adding additional information about the transaction by hand or cash register.

Credit card—card, usually plastic, used for charging purchases. Includes such information as the name of the company providing the credit, the customer's name and account number, and the card's expiration date. Also called **charge card** or **charge plate**.

Credit card bulletin—bulletin that lists numbers of credit cards that should not be accepted for charge sales.

Credit limit—maximum amount a customer may charge to a credit account.

Floor limit—maximum amount that may be charged without additional identification or authorization.

75.86 (b)(11) Marketing Mathematics

(B) Demonstrate ability to calculate profit, loss, payroll, invoices, taxes, interest, sales slips, credit card purchases, and *purchase orders*.

Purchase order (PO)—written form used by a business's buyer to order goods or services from a seller.

75.86 (b)(11) Marketing Mathematics

(C) Demonstrate proficiency in cashiering and cash register operations.

Amount keys—cash register keys used to record the purchase price of a product or service.

Amount received key—cash register key used with the change due key to calculate the amount of change due a customer.

Autographic window—opening on a cash register that allows the cashier to see the information recorded on a detailed audit tape.

Cash bank—money supply at the start of selling day used to make change. Also called **cash fund, opening fund,** and **opening change fund.**

Cash drawer—cash register drawer that holds money in an organized manner so that it can be received and dispersed properly and efficiently. Contains a cash tray for holding currency and coins.

Change due key—cash register key used with the amount received key to calculate the amount of change due a customer.

Change plate—small shelf above the cash register's cash drawer used to hold customer's money while the cashier makes change.

Correction key—cash register key used to remove an incorrect entry before it is permanently recorded by the register. Also called a **clear key** or **release lever**.

Date-setting mechanism—part of the cash register used to set the day, month, and year so that this information is printed on cash register receipts and detailed audit tapes.

Department keys—cash register keys used to record sales information by department or classification. Also called **classification keys**.

Detailed audit tape—paper tape printed by a cash register that serves as a permanent record of all the register's transactions.

Indication window—glass window on a cash register that allows the cashier and the customer to see the information that is being recorded on the register.

Motor bar—cash register key that activates the register to permanently record entered information on a detailed audit tape. Also called **entry key**.

No-sale key—cash register key used to open the cash drawer without recording a transaction.

Overage—the amount of actual cash in the cash bank at the end of the sales day that is more than what should be in the drawer.

Over-ring—more than the price of an item is entered into the cash register.

Proof of cash—written summary of the cash transactions during a business day showing how much money was (1) in the cash bank at the beginning of the day, (2) received during the day, (3) paid out during the day, and (4) in the cash drawer at the end of the day, indicating any resulting overage or shortage.

Proving cash—process of preparing a proof of cash summary.

Receipt printer—part of a cash register that allows the information entered into the register to be printed on a sales form.

Receipt tape slot—opening on a cash register through which a customer's receipt tape is dispersed.

Sales tax key—cash register key used to add sales tax to the subtotal.

Salesperson's identification keys—cash register keys used to record information on each salesperson's sales, such as the number and total amount of his or her sales and which sales he or she handled.

Shortage—the amount by which actual cash in the cash bank at the end of the sales day is less than what should be in the drawer.

Subtotal key—cash register key used to total the prices of the items in a transaction before adding sales tax.

Total key—cash register key used to add the subtotal and the sales tax to get the final total amount of the sales transaction.

Transaction keys—cash register keys used to record the types of sales, such as cash, charge, received on account, paid out, and refund.

Under-ring—less than the price of an item is entered into the cash register.

Wrapping—enclosing goods in a protective cover after the sale has been recorded. Examples include bagging, boxing, wrapping in paper, and gift wrapping.

75.86 (b)(12) Successful Employment and/or Postsecondary Training
75.86 (b)(13) Human Relations and Personality Development
75.86 (b)(14) Personal and Business Management
75.86 (b)(15) Business Communication

Note: The (b)(12) through (b)(15) essential elements were originally common to all courses, and so there were no definitions in the previous Marketing Education I guide. The elements for (12) through (15) are the basis for a new individualized publication, *Preparing to Succeed in Marketing*, which should be consulted for possible terms to know. Other significant terms are in *Mathematics: Essential to Marketing*.

75.86 (b)(16) Specific Occupational Objectives

Essential element 75.86 (b)(16) reads, "Develop concepts and skills relevant to the specific occupational objectives of the students." Relevant terms for this element were not included in the Marketing Education I guide, but are in the EIMC-Educational Resources individual publications for co-op situations.

Also Available from Educational Resources/EIMC/UT-Austin

Job-related Manuals for Co-op Situations

New Format Series, with Answer Book/Teacher's Guides That Include Information for Planning Co-op Training

Advertising Basics and Careers, Student's Manual (DE 820 S)
    Answer Book/Teacher's Guide (DE 820 A)
Apparel Marketing, Student's Manual (DE 419 S)
    Answer Book/Teacher's Guide (DE 419 A)
Basic Visual Merchandising, 2nd edition, Student's Manual (DE 821 S)
    Answer Book/Teacher's Guide (DE 821 A)
Food Service Management, 2nd edition, Student's Manual (DE 608 S)
    Answer Book/Teacher's Guide (DE 608 A)
General Merchandising, 2nd edition, Student's Manual (DE 819 S)
    Answer Book/Teacher's Guide (DE 819 A)
Home Improvement Center Retailing, Student's Manual (DE 316 S)
    Answer Book/Teacher's Guide (DE 316 A)
Marketing Fibers and Fabrics, Student's Manual (DE 418 S)
    Answer Book/Teacher's Guide (DE 418 A)
    (A CAI set for this title for use on Apple II is also available.)
Physical Distribution, Revised, Student's Manual (DE 818 S)
    Answer Book/Teacher's Guide (DE 818 A)
Supermarket Customer Service, Student's Manual (DE 604 S)
    Answer Book/Teacher's Guide (DE 604 A)
    Produce Photo Album available for use with this manual (DE 605 R)
Supermarket Merchandising, Student's Manual (DE 606 S)
    Answer Book/Teacher's Guide (DE 606 A)
Supermarket Special Departments, Student's Manual (DE 607 S)
    Answer Book/Teacher's Guide (DE 607 A)
Tourism and Hospitality Marketing, Student's Manual (DE 333 S)
    Answer Book/Teacher's Guide (DE 333 A)

Manuals and Answer Books in the Previous Series

For occupations in appliance marketing, automotive and accessories marketing, business and personal services, convenience store operations, financial services marketing, food marketing, food service marketing, furniture marketing, shoe sales marketing, hardware selling, home and office products marketing, industrial marketing, jewelry and gift store marketing, wholesale marketing, specialty marketing, home entertainment equipment marketing, service station marketing, and travel services marketing.

Of Special Interest

Mathematics: Essential to Marketing. The 34 assignments in the Student's Manual (DE 116 S) cover math from addition and subtraction through ratios and equations used by management to judge success of a business. A Teacher's Guide (DE 116 C) includes practice problems to be copied, answers, and other features.

COMPLIANCE STATEMENT

TITLE VI, CIVIL RIGHTS ACT OF 1964; THE MODIFIED COURT ORDER, CIVIL ACTION 5281, FEDERAL DISTRICT COURT, EASTERN DISTRICT OF TEXAS, TYLER DIVISION

Reviews of local education agencies pertaining to compliance with Title VI Civil Rights Act of 1964 and with specific requirements of the Modified Court Order, Civil Action No. 5281, Federal District Court, Eastern District of Texas, Tyler Division are conducted periodically by staff representatives of the Texas Education Agency. These reviews cover at least the following policies and practices:

(1) acceptance policies on student transfers from other school districts;

(2) operation of school bus routes or runs on a non-segregated basis;

(3) nondiscrimination in extracurricular activities and the use of school facilities;

(4) nondiscriminatory practices in the hiring, assigning, promoting, paying, demoting, reassigning, or dismissing of faculty and staff members who work with children;

(5) enrollment and assignment of students without discrimination on the basis of race, color, or national origin;

(6) nondiscriminatory practices relating to the use of a student's first language; and

(7) evidence of published procedures for hearing complaints and grievances.

In addition to conducting reviews, the Texas Education Agency staff representatives check complaints of discrimination made by a citizen or citizens residing in a school district where it is alleged discriminatory practices have occurred or are occurring.

Where a violation of Title VI of the Civil Rights Act is found, the findings are reported to the Office for Civil Rights, Department of Health, Education and Welfare.

If there is a direct violation of the Court Order in Civil Action No. 5281 that cannot be cleared through negotiation, the sanctions required by the Court Order are applied.

TITLE VII, CIVIL RIGHTS ACT OF 1964: EXECUTIVE ORDERS 11246 and 11375; TITLE IX 1973 EDUCATION AMENDMENTS: REHABILITATION ACT OF 1973 AS AMENDED; 1974 AMENDMENTS TO THE WAGE-HOUR LAW EXPANDING THE AGE DISCRIMINATION IN EMPLOYMENT ACT OF 1967; VIETNAM ERA VETERANS READJUSTMENT ASSISTANCE ACT OF 1972 AS AMENDED IN 1974.

It is the policy of the Texas Education Agency to comply fully with the nondiscrimination provisions of all federal and state laws and regulation by assuring that no person shall be excluded from consideration for recruitment, selection, appointment, training, promotion, retention, or any other personnel action, or be denied any benefits or participation in any programs of activities which it operates on the grounds of race, religion, color, national origin, sex, handicap, age, or veteran status (except where age, sex, or handicap constitute a bona fide occupational qualification necessary to proper and efficient administration). The Texas Education Agency makes positive efforts to employ and advance in employment all protected groups.

DE 117 C

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